

IMPROVING QUALITY REFERRALS FOR VOCATIONAL REHABILITATION CONSUMERS DURING TIMES OF INSUFFICIENT FISCAL RESOURCES

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Improving Quality Referrals for VR Consumers During Times of Insufficient Fiscal Resources





- **Mission Statement:** The mission of the New Mexico Division of Vocational Rehabilitation is to encourage and assist the efforts of New Mexicans with disabilities to reach their goals for working and living in their communities.
- **Vision Statement:** Every New Mexican with a disability has the opportunity to contribute to the quality of life and the economic prosperity of the state.




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Quality is a measure of excellence, a consistent adherence to measurable and verifiable standards to achieve uniformity of output that satisfies specific customers or user requirements.

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New Mexico DVR Defines Quality Service as:

- Dignity and respect for participants
- Participant satisfaction with appropriate timely service delivery
- Acquisition and retention of suitable employment
- Maintaining communication
- Active involvement by the participant
- Clear, relevant and sequential case file documentation




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New Mexico Program Managers Define Quality as:

- **Consistency**
Case management records meet required guidelines
Equitable treatment of consumers
- **Thoroughness**
Counseling is methodical and comprehensive
Case management is done with precision
- **Accuracy**
Written record of events




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New Mexico DVR Consumer Perspective on Quality

2012 Consumer Satisfaction Needs Assessment Survey

Satisfaction with Services
All Respondents (n=123)

Q1: Overall, I was satisfied with the quality of services I got.
Minimum (0) to 5 = Agree




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New Mexico DVR Consumer Perspective on Quality:

2012 Consumer Satisfaction and Needs Assessment Survey

Table 1: Top 5 Positive Trends

Top 5 Positive Trends	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	No Opinion
Q6: Courteous Staff	48.7%	34.5%	8.8%	6.2%	0.0%	1.8%
Q7: Counselors' Knowledge	46.0%	31.0%	8.8%	8.0%	4.4%	1.8%
Q17: Transportation	41.5%	40.6%	11.3%	4.7%	0.9%	0.9%
Q20: Living Situation	38.1%	38.9%	9.7%	7.1%	4.4%	1.8%
Q10: Goals	33.6%	39.8%	10.6%	8.0%	2.7%	5.3%

n = 123

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New Mexico DVR Consumer Perspective on Quality:

2012 Consumer Satisfaction and Needs Assessment Survey

Top 5 Negative Trends

Top 5 Negative Trends	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know	No Opinion
Q23: Income	9.9%	26.1%	36.9%	18.9%	2.7%	5.4%
Q14: Job	18.4%	9.7%	21.4%	19.4%	4.9%	26.2%
Q22: Training / Education	21.2%	26.5%	22.1%	17.7%	5.3%	7.1%
Q21: Technology	18.9%	30.6%	18.9%	15.3%	8.1%	8.1%
Q18: Public Transportation	14.7%	25.5%	21.6%	9.8%	12.7%	15.7%

n = 123

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New Mexico DVR Consumer Perspective on Quality:

Based on the Consumer Satisfaction and Needs Assessment Survey the following recommendations were identified:

- Provide staff with training and support
- Engage and involve Participants
- Diversify and leverage resources
- Enhance Participants' access to training, education and job supports

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Economic Resources: Employees

- Prior to 2008 the VRC vacancy rate was 10%
- State-wide hiring freeze began in 2008
- VRC vacancy rate grew to 23% within the NMDVR agency
- Overall vacancy rate was at 23%
- January 2012 hiring freeze relaxed
- Vacancy rate remains at 22%

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Economic Resources: Budgetary

Basic Support State General Fund Awarded by State Fiscal Year

State Fiscal Year	Basic Support State General Fund Awarded
SFY 2007	~4,550,000
SFY 2008	~4,700,000
SFY 2009 w/cuts	~4,450,000
SFY 2010 w/cuts	~4,400,000
SFY 2011 w/hiring	~4,400,000

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Economics:

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Caseload Economics:



Totals Counts by Agency Type, FY 2008-FY 2011

Agencies	Number of Eligible Individuals	Number of Eligible Individuals per Million of State Population	Number of Plans	Number of Cases Closed with Employment
General				
2008	355,755	2,328	484,792	104,132
2009	349,076	2,261	482,386	92,002
2010	362,773	2,332	494,380	87,039
2011	330,373	2,103	496,850	91,339




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Reason for Order of Selection

- Budget reductions during fiscal years '09, '10, '11, and '12 resulted in limited financial and personnel resources

Mandate

- The law calls for prioritizing individuals into categories for receiving services under "Order of Selection"

Priority based on level of disability

- "Most Significantly Disabled"
- "Significantly Disabled"
- "Individuals with a Disability"




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NMDVR Information and Referral Requirements

- Federal Regulations support any VR agency operating under OOS
Must follow minimum requirements established by:
[Rehabilitation Act: Section 101(a)(5)(D) of the Act and 34 CFR 361.36(a)(3)(iv)]

NMDVR Compliance:



- Provide counseling which results in referrals for job placement to attain and maintain employment
- Must refer to federal and state programs such as local Workforce Investment Systems, Native American VR Programs, Commission for the Deaf and Blind, and Veteran's VR Programs
- Ensure individuals on the waiting list have access to services provided through an information and referral system

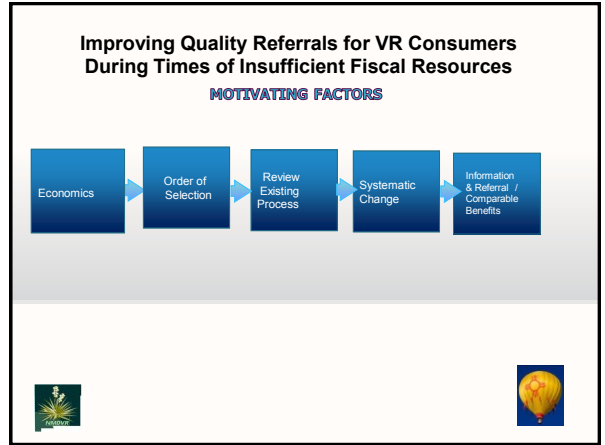
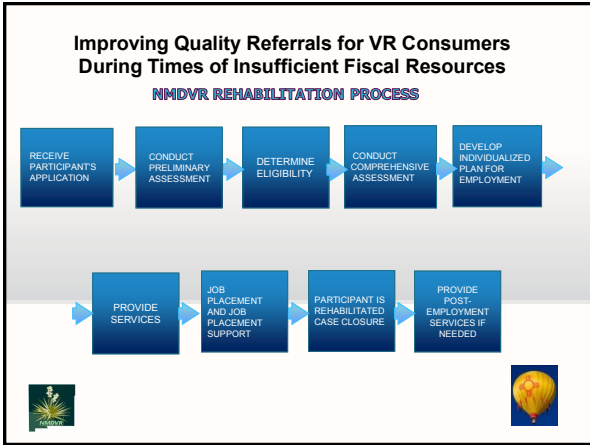



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NMDVR Information and Referral Requirements

- Initiate a notice of referral
- Name of the program
- Point of contact
- Suitable services
- Document in the participants' case file
- Letter to participant denoting their priority group
- Priority group currently receiving services
- Participants' right to appeal priority assignment
- Information and referral meeting and letter



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Information & Referral Database Vision Statement

To generate a web-based information and referral tool that is based on subject-category, easy to manage, efficient, comprehensive, and will promote quality reporting and consumer satisfaction.

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INFORMATION & REFERRAL EXPECTATIONS

- 1 NMDVR Information and Referral (I&R) under Order of Selection (OOS)
- 2 A database for I&R information that is easily accessible
- 3 Identified comparable benefits easily located statewide
- 4 Cost effective and easy to input and navigate
- 5 Categorical options (taxonomy)
- 6 Increase collaboration with outside agencies
- 7 Incorporation into a case note

The graphic shows a hand holding a glowing blue orb with several data points or lines radiating from it, symbolizing information and referral.

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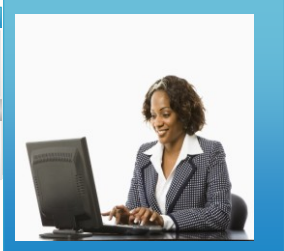
RESEARCH AREA'S IDENTIFIED



1 Utilize Current Case Management System

- What would this take?
- Who would be involved?
- Could referral letters be generated?
- What system are being used in other states?

2 Options

- What other software tools?
- Microsoft Share Point
- What is OOS TEAM implementing today?
- What resources are staff using today?
- What are the other websites and links?





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OTHER STATES CURRENTLY UNDER OOS AND UTILIZING AWARE

NO FORMAL DATABASE	FORMAL DATABASE
<p>1 OREGON:</p> <ul style="list-style-type: none"> • Manages their own database • Response database would be useful <p>VIRGINIA:</p> <ul style="list-style-type: none"> • Unaware of such a database • No additional information provided <p>LOUISIANA:</p> <ul style="list-style-type: none"> • No formal database • Response would be useful for staff <p>COLORADO:</p> <ul style="list-style-type: none"> • Does Not utilize AWARE • No formal database • Managed individually 	<p>2 OKLAHOMA:</p> <ul style="list-style-type: none"> • A successful database on website • Initial review – data format is useful <p>MARYLAND:</p> <ul style="list-style-type: none"> • Has a specialized resources section on Intranet for staff use

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Initial Meeting

- Chief Information Officer and Data Unit Administrator
- Discussion regarding integration with current case management system (AWARE)

Objective:

- Integrate with current case management system
- Generate referral letters
- Review data availability on the Internet or Intranet

Status:

- Continue research for integration requirements




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CURRENT METHODS IN USE



- **AREA OFFICE DATA GATHERING**
 - Currently, several offices are gathering and storing data in WORD and EXCEL as directed by Program Managers
- **INDIVIDUAL DATA GATHERING**
 - Individuals utilize their own method for tracking comparable benefits and outside resources
 - Online websites
 - Personal drive
 - Resource manual
 - Hard copy (i.e. file cabinet)
- **OOS INSTRUCTIONAL S DRIVE DATA GATHERING**
 - S:\Order of Selection I & R
 - Breakdown by area office & Albuquerque Metro




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I & R SURVEY CONDUCTED AND RESULTS

1 Do you currently use a database for the OOS required I&R process?

2 How do you look up I & R data?

Do you currently use a database for the OOS required I and R process?

Response	Percentage
No	~40%
Yes	~60%

How do you look up I and R data?

Method	Percentage
Other	2.5%
OAS Internet	11.8%
Personal List	41.2%
Intranet	11.2%
Area Office Drive	11.2%
Via the Web	11.2%

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I & R SURVEY OF VRC AND VR STAFF CONDUCTED AND RESULTS

3 Which issues might impede your use of the current OOS I&R area office MS Word look up document?

4 Do you think an I&R database accessible through AWARE would benefit you in locating information for clients?

What issues might impede your use of the current OOS I & R area office MSWord look up document? (choose all that apply)

Do you think an I & R database accessible through AWARE would benefit you in locating information for clients?

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I & R SURVEY CONDUCTED OF VRC AND VR STAFF AND RESULTS

5 Would you find value using an all-inclusive statewide resource system, such as ReferNET software?

6 Any additional feedback in the use, implementation of a database resource and/or format of the data gathered are welcome, please provide below.

Would you find value using an all-inclusive statewide resource system, such as ReferNET software? (www.ReferSoftware.com)

Internal DVR Employee Survey

- Revealed a current need to have access to a range of information
- Readily available through AWARE
- Request it be user-friendly

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S Drive OOS Resource Documents

1 INTRODUCTION

Staff identified to input data

- In a Word Document (template)

2 POSITIVE COMMENTS

- Ease of use
- Ability to access the directory for referrals
- Created folder and data structure
- Created a hard copy resource

3 NEGATIVE COMMENTS

- Time consuming to update & maintain
- Organizing data was difficult to manage
- Tendency to use familiar methods of data collection (prior to OOS)
- Many agencies experiencing funding cuts



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BRINGING THESE ELEMENTS TOGETHER

KNOWLEDGE OF BENEFIT PROGRAMS OUTSIDE AGENCY

- I & R requires a working knowledge of agency programs, contact person for optimal efficient referrals

5 MAJOR CATEGORIES FOR APPROPRIATE REFERRALS OUTSIDE AGENCY

- Housing** - Section 8, HUD, homeless shelters, etc.
- Job search** - Workforce Solutions, CSEP for senior employment, Goodwill, Teamworks
- School Funding** - FAFSA, lottery scholarship, disability resource office
- Medical and Mental Health Services** - Indigent and sliding scale programs for medical and psychological disabilities
- Small Business Development** - West Corp, SCORE, SBA




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What are our options?

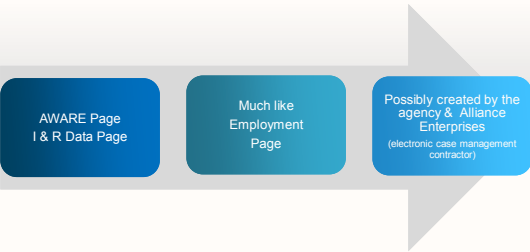




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OPTION 1: New Feature in AWARE



AWARE Page I & R Data Page

Much like Employment Page


Possibly created by the agency & Alliance Enterprises
(electronic case management contractor)

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OPTION 2: RESEARCH OF REFERNET

Easy to Use	<ul style="list-style-type: none"> Provide a complete Information & Referral software system for use by agency staff for the purpose of searching and maintaining resource data.
Data stored by ReferNET updated by agency staff	<ul style="list-style-type: none"> Web-based search engine allows public access to customer's resource database. Website is designed to customer specifications and can be easily interfaced with agreed agencies.
Minimal Expense	<ul style="list-style-type: none"> Provides training for the ReferNET software system. (additional cost) Provides technical support for all software systems. (additional cost)




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OPTION 2: RESEARCH OF REFERNET

The Refernet website is a referral service for various services. The search interface includes a search bar, a 'Search by Service' dropdown menu, and a 'Search by Agency or Program Name' dropdown menu. The website also features a 'Refernet' logo and a 'United Way' logo.

<http://www.refersoftware.com/refernet.aspx>

<http://www.refersoftware.com/uwcnm/>

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OPTION 3: RESEARCH MICROSOFT SHAREPOINT

WHAT IS SHAREPOINT ?

- SharePoint is a web application
- Designed to centralize multiple web applications
- Web content management
- Document management on
 - Intranet portals
 - Extranet portals
 - Websites
 - Collaboration sites

SHAREPOINT - GOVERNANCE

- "the set of policies, roles, responsibilities, and processes that guide, direct, and control how an organization's business division and IT teams cooperate to achieve business goals."

SHAREPOINT - Key Benefits & Challenges

ORGANIZATIONAL BENEFITS

- Pervasive Collaboration
- Delegated Administration
- User Experience
- Employee Self-service

MANAGEMENT CHALLENGES

- Site and Information Architecture
- Securities and Policies
- Operational Procedures
- Compliance

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OPTION 3: RESEARCH MICROSOFT SHARE POINT

<h4>1 DVR'S CURRENT NETWORK AND DEVELOPMENT ENVIRONMENT</h4> <ul style="list-style-type: none"> File structure - store data Intranet - recently re-developed TAS, LIFT, DVR Staffing AWARE - remains a potential solution for database Intranet link to a database still a viable solution Current IT Plan includes: <ul style="list-style-type: none"> 64-bit Server migration Workstation Window7 migration Training for network and developers transitioning to a 64-bit environment 	<h4>2 FEASIBILITY AS A SOLUTION</h4> <ul style="list-style-type: none"> Not in IT Plan Requires budget to develop SHARE Point Network Requires a change in business practices Re-defining governance of IT practices <ul style="list-style-type: none"> Network security User data Website content Data management Require user training Require IT training
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SWOT ANALYSIS

<h4>1 STRENGTHS</h4> <ul style="list-style-type: none"> Viable and feasible project Multiple solutions Interest with other states Effectively connecting VR consumers to required core services DVR staff leverage of services 	<h4>2 WEAKNESS</h4> <ul style="list-style-type: none"> Staff expertise with data collecting Time How to collaborate with other state agencies Ongoing maintenance
<h4>3 OPPORTUNITIES</h4> <ul style="list-style-type: none"> Intra-state agency collaboration Multiple state interest in the project Add AWARE enhancements All-inclusive comparable benefit tool 	<h4>4 THREATS</h4> <ul style="list-style-type: none"> Funding Giving up on the project Staff to enter in data Ongoing maintenance

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The Next Step

- Identify solution
- Present to leadership
Sept. 25 & 26, 2012
- Continue services and quality employment outcomes

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TARGET

- Easy to manage**
 - IT supported
 - Managed by field staff
 - Protocol in place for adding and updating resource information
- Taxonomy (Based on subject-category)**
 - Information can be found by resource subject
 - Information can be found alphabetically
- Efficient and comprehensive**
 - Easy to find and available at dvrgetsjobs.com intranet
 - Can effectively populate I and R resource letters with data

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CONCLUSION

- Quality**
 - Assurance
 - Delivery of services
- Economy**
 - Reduction in resources
 - Reduction in funding
- Requirements OOS**
 - Compliance
 - Existing methods in place
- Research**
 - Survey
 - Potential solutions
- Options**
 - ReferNET
 - SharePoint (Microsoft)
 - Integration with existing case management system

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CONCLUSION

Vision

↓

Collaboration

↓

Planning

→

Quality Referrals = Fiscal Responsibility

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THANK YOU!!!!



Photographs by Bill Tondreau

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