ANCOR has been named to the 2010 Associations Advance America Honor Roll, a national awards competition sponsored by the American Society of Association Executives (ASAE) and the Center for Association Leaders of Washington, DC. ANCOR received the award for its National Advocacy Campaign (NAC) for Direct Support Professionals (DSPs).

The Associations Advance America (AAA) Awards recognize innovative association programs, activities and initiatives that advance our society in a way that goes beyond the association’s “everyday” best practices to truly generate a public benefit.

“We are thrilled that ANCOR and its members are recognized for their extraordinary commitment to strengthening the fabric of our communities,” exclaimed Renee Pietrangelo, CEO of ANCOR. “To be among 24 associations to be added to the elite 2010 Associations Advance America Honor Roll, out of thousand of entrants, is a huge compliment.”

ANCOR’s nomination for the award focused on three specific areas of the campaign:

- The DSP of the Year Awards, which recognize DSPs who build social capital for consumers, demonstrate leadership and exceed expectations;
- DSP Recognition Week, which fosters national, state and local celebrations that highlight the value of DSPs who make inclusion in community life possible for people with disabilities; and
- Federal advocacy, including H.R. 868 which aims to alleviate the wage crisis and ANCOR’s ongoing collaboration with the U.S. Department of Labor to advance training and professionalism among DSP.

We all know that, while the demand for supports and services is increasing, the number of DSPs to provide essential supports and services is not keeping pace. The NAC aims to ensure the present and future needs are met by seeking a legislative remedy to critical low wages, encouraging training and professionalism among DSP, and increasing public awareness of an otherwise “hidden” profession.

In making this award, ASAE recognizes that the continued success of the NAC is having a positive effect on communities across the nation. More and more people understand that DSPs provide the supports and services that are essential to people with disabilities and others, such as older Americans, allowing them to live meaningful lives in communities and circumstances of their choosing. With one in ten American families touched by a disability and with all of us facing concerns about supports and services as we age, this is truly an effort that affects us all.

ANCOR members can be justifiably proud of their achievement. We could not have achieved this success without the joint effort of our diverse membership. We encourage you to distribute the news of this award in your community. A copy of the press release is available here.

We also encourage you to use the award icon on your websites and documents. Download a copy here.
In times of pervasive uncertainty it’s imperative that we have the feedback we need to assure ANCOR’s relevance to member stakeholders, while at the same time taking the lead in supporting our members to successfully navigate and flourish into the future.

We continue our work to anticipate future economic, social and political directions and develop responses accordingly. We want to be able to consider plausible outcomes, monitor them and try to influence the one(s) that are most desirable for our member stakeholders. However, that work is incomplete without rich feedback and input from our members.

There’s a great deal at stake during these transformational times. I enjoin you to set aside the short time you’ll need to complete and return the ANCOR member survey.

ANCOR’s Vision
Advancing excellence in supports and services ~ Leading the way to communities of choice.

ANCOR’s Mission
To inform, educate and network service providers to safeguard, develop, grow and extend their capacity to support the choices of people with disabilities.

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You probably have noticed that there is a 40th anniversary theme in many of the LINKS articles that have appeared so far this year and certainly that will continue over the coming months. Anniversaries are always worth noting and celebrating! One of the many nice things about celebrating an anniversary is that you get an opportunity to look back. This may seem odd for many of us, since ANCOR is a group of forward thinking people. However, we must always remember the past and the debt we owe to those who pioneered the way to today, just as we are pioneering the way into tomorrow.

I’d like to take a moment to recognize one such member, our former treasurer Frank Capone. Now, Frank doesn’t trace his roots back to the earliest days of ANCOR. Frank was not the person to loudly push his ideas nor was he as political as a lot of us. In fact, you might say that Frank was a relatively quiet voice. (Relatively, because there is no real thing as a quiet ANCOR member!) But Frank was a person with big ideas about how we could change ANCOR’s future and, in fact, insure ANCOR’s future. I would like you all to listen for a minute to his idea and what you can do to not only help actualize this idea and help ANCOR, but to also do something that helps your own agency as well.

Like all of ANCOR’s treasurers before him, Frank’s main job was to make sure we had a balanced budget and one that we stuck to. He championed many changes as treasurer and was able to accomplish something no other treasurer had done before him: align our fiscal and programmatic years. A difficult task indeed! However, Frank will hopefully be remembered at the next big anniversary for a far bigger accomplishment. Frank put forward the notion that not only would it be a good idea to run this organization with income other than dues income but, in fact, we could, with a small amount of effort, run this organization with no dues money at all. Frank didn’t just throw the idea out onto the floor as a utopian goal—he threw the idea out with a strategy of how to do it. Now you’re all out there saying, “Geez, didn’t I just pay my dues? So where is this great idea and how come it didn’t work?”

The idea was simple: we could sell insurance that everyone needed/wanted or could use to our members and the residuals due back to ANCOR could readily offset the dues. In fact, Frank’s idea sounded so good that ANCOR embarked on this course. We set up a separate corporation for that purpose, found a staff member with an insurance broker’s license and everything. He solicited several companies and finally came forward, with the assistance of our excellent staff, with a plan. We secured a commitment from Philadelphia Insurance, a major carrier of liability insurance and another insurance company headed up by Ross Setlow that created benefit enhancements via supple-

See President, page 6.
Information Technology Planning for Executives

In today’s world of reduced funding, it is essential that all IT investments be examined in terms of how they will help the agency achieve strategic goals and fulfill the mission. Too often, this is not the case. The result is the investment is either not approved or does not deliver the value expected and the software gets limited use. What happened?

- How the project was to help achieve the agency’s strategic goals was not central to the decision.
- The accountability for the project was delegated to someone that “understands computers.”

Learn how to maximize organizational value from IT decisions by attending our presentation “Information Technology for Executives”. You will get inside information on how other agencies are making IT investments that deliver the business value expected and help fulfill their mission. Just click on the link below to learn more or register.

“...I appreciate the approach you took in explaining what agencies should be looking for as they embark on their search. This is the most solid approach to take with agencies that don’t know which way to turn and are confused by all the vendors out there...”

Chris Blake
CASS, Inc - Iowa

Visit www.vertexsystems.com/session to read about this presentation and how to sign up for our next webinar. Or call 866-981-2600 x102 and talk to the presenter directly.

Talk to Vertex customers that are ANCOR members?
Wabash Center, New Horizons Rehabilitation, Adjustment Training Center, Abilities Services, Individual Support Systems, ECCO, Inc.

For more information, visit www.vertexsystems.com today.
2010 Management Practices Conference Preview
Solid Business Strategies for Surviving and Thriving, Tools to Help You Weather the Current Storm

Surviving and thriving in tough times requires organizations to adopt two approaches. First, providers need to take a ‘back to basics’ approach looking carefully at what they do well and finding ways to do that even better. Second, they need to systematically identify opportunities to increase efficiency and achieve greater impact in their community.

For some organizations, consolidations, mergers and strategic partnerships within the human services sector hold the answer. These organizations find that a consortium model for technical and management support will increase efficiency, leverage finite resources and produce demonstrable impact. It just makes sense. In some cases, these organizations have begun to discuss potential mergers as a possible solution.

To help ANCOR members make the best decisions for their agencies, Vance Yoshida, Senior Manager, LaPiana Consulting, will deliver a plenary and extended breakout session at the 2010 Management Practices Conference and Trade Show which will:

- Identify key trends in mergers, consolidations and partnerships
- Identify common myths about these 3 opportunities
- Assist providers in assessing what opportunities exist for them to pursue
- Identify a plan of action to pursue

In the current economy, there is no ‘one size fits all’ solution to the issues plaguing the provider community. But there are concrete business strategies providers can use to increase efficiency and positively affect the lives of individuals with disabilities. Come to the ANCOR Management Practices Conference and Trade Show and learn how.

Resources available here include:

- Strategic Restructuring for Community Clinics: Options and Examples
- Surviving and Thriving in Tough Times: a Framework for Nonprofits Facing Economic Stress
- Mergers: A Cautionary Note
- Five Myths About Partnerships
- Administrative Collaborations, Consolidations, and MSOs

These and other resources can be found here.

ANCOR Foundation Walk for Disaster Relief to Raise Monies for Agencies Affected by Disaster

The ANCOR Foundation will hold the 2010 Walk for Disaster Relief on Tuesday, April 13 in concert with ANCOR’s Management Practices Conference and Trade Show. This leisurely 1.5 mile walk will help build reserves for the ANCOR Foundation CARES Fund, a fund designed to assist colleague agencies and disability focused organizations affected by natural or man-made disasters.

Through the power of this fund, the ANCOR Foundation recently made a $5,000 contribution to assist ANCOR member International Child Care, Dominican Republic assess and address the needs of individuals with disabilities in Haiti. Previous contributions have assisted individuals with disabilities resettle into the New Orleans community post-Katrina, among others.

Help ANCOR Foundation focus its energies on assisting community providers in need. Choose one of these three ways to get involved in the 2010 Walk for Disaster Relief:

- Register for the Walk ($40, includes a T-shirt and boxed lunch)
- Serve as an official sponsor of the Walk
- Make a general contribution to ANCOR Foundation CARES Fund.

Note: The ANCOR Foundation is a 501(c) (3) organization. Contributions made to the ANCOR Foundation CARES Fund are tax deductible. To learn more about the ANCOR Foundation, go here.
mental insurance products that added value to the package we offer our staff at no cost to the sponsoring agencies. There were a lot of problems to resolve, however. Many of our agencies already had insurance relationships through local brokers that were valuable to them. In addition, many members already were using Philadelphia and our residuals were only based on new customers and finally the people selling the supplemental insurance program frankly just weren’t that good. However, ANCOR learns quickly and we went to work on improving the idea. The first change was to look at products other than insurance for our members to purchase. Since nothing is simple in ANCOR, we also decided that merely selling products did not provide our members with enough added value, though it helped ANCOR and saved folks money. So we developed a whole network around purchasing, providing discounts on products but also providing access to leading practices on purchasing and the ability to use the nationally generated product prices to benchmark against our own purchasing deals. A lot of our members are enjoying savings through these initiatives and the residual income has been instrumental in balancing our budget and keeping our dues very low. But that has not been enough, obviously, to eliminate dues altogether. Something else was needed.

Working with Ross we were able to secure an arrangement with the Aflac Insurance Corporation. Everyone knows the duck right? The good folks at Aflac said that not only could we have the duck but in fact they would design an ANCOR duck if we made this project a success (one with a white beard!). After much hard work on the staff’s part a contract was negotiated and we rolled the product out. Now some of you might be a little leery of these kinds of products; I know I was. Being the good ANCOR soldier and given the duck’s recognition I enthusiastically had the Aflac people in to our agency. The results were very surprising- almost a third of my 700 employees bought the product. The Aflac folks did a great job, coming in unobtrusively and making their sales pitch brief. The demographics of the purchases cuts right across our agency- from new staff to long term staff from hourly to salary folks. Several months later they are still enthusiastic about the product. Although I invited them in, I didn’t pay much attention to the results until our sales rep, Bob Kurtz, popped up at my door one day asking if I would help introduce him to some of Maine’s other providers. I was really leery- not only am I letting this insurance guy in; I now was wondering if the good ANCOR soldier and given the duck’s recognition I enthusiastically had the Aflac people in to our agency. What are you waiting for? I am now waiting for the ANCOR duck!

The results to date:

- Over 400 people have enrolled in CDS to date
- 121 of the 125 participants in WIN have remained at RHA Howell
- 26 individuals have received promotions
- All WIN participants are carrying a combined GPA of 3.0
- Over 60% of participants are in medical programs (an increase of 10% over FY09)

Next Steps

Students from the University North Carolina at Chapel Hill are working to help create a sustainable business plan so that the WIN model can be used in other areas.

Come to the 2010 Management Practices Conference and Trade Show and hear from WIN Representatives Rashelle Brooks and Jeff Gallagher as they share further details on the promising program!

To learn more about the program, go to http://www.workforceinvestment.org/
Philadelphia Insurance Companies (PHLY) is committed to ANCOR and its members. Our sponsorship agreement with ANCOR supports its awareness and educational campaigns.

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8. Tenants Legal Liability limit of $1,000,000 included on the General Liability form
9. General Liability - Broad definition of Insured includes medical directors, administrators and any person or organization under your direct supervision and control
10. Interest free installments available

PHLY, in operation since 1962, whose commercial lines insurance subsidiaries are rated A+ (Superior) by A.M. Best Company and AA for counterparty credit and financial strength by Standard & Poor’s, is nationally recognized as a member of Ward’s Top 50.

Call us for a free, no obligation quote 800.873.4552 or email phlysales@phlyins.com.
We will gladly work with your current agent. Remember to mention that you are an ANCOR member.
The ANCOR Foundation is pleased to solicit nominations for its Legacy Leaders Project. This effort, designed in concert with ANCOR’s 40th anniversary, will celebrate the accomplishments of the men and women who have paved the way in making ANCOR the premier trade association representing more than 800 private providers for nearly 500,000 Americans with disabilities.

Nominations can come from a variety of sources, including:
- Self-nomination
- Agency board of directors
- Agency personnel
- Family Member
- Colleague

Cost to nominate someone is a minimum of $1,000. These contributions will be used to create training and development programs for future leaders in the disabilities field.

The accomplishments of the inaugural class of the Legacy Leaders Project will be unveiled at ANCOR’s Management Practices Conference and Trade Show, April 11th-13th in New Orleans. Nominations will be accepted on a rolling basis thereafter.

Click here to access the nomination form.

Please note: The ANCOR Foundation is a 501(c) 3 charitable organizations. Contributions made to the foundation are tax-deductible.

The American Network of Community Options and Resources (ANCOR) and the National Council for Community Behavioral Healthcare (NCCBH) will hold the 2nd annual Technology Leadership Summit at the Westin Westminster Hotel in Westminster, Colorado on Friday, October 22, 2010, immediately following the Tenth Annual Coleman Institute on Cognitive Disabilities Conference, held October 21.

The day-long event will provide CEOs/Executive Directors and technology-focused professionals with the opportunity to discuss key technological challenges they face, brainstorm solutions and hear about the latest innovations in the service arena. ANCOR is pleased to partner with NCCBH for this year’s event, which will allow us to focus on how technology can lead to more responsive supports to individuals with I/DD, mental health and addiction disorders.

Space will be limited to 150 participants.

The NCCBH is a national trade association representing over 1,600 organizations supporting 6 million adults and children with mental illness and addiction disorders.

Be on the lookout for further details in the near future!

Disability is a matter of perception. If you can do just one thing well, you’re needed by someone.

--Martina Navratilova
President Obama signed an executive order February 18th establishing the bipartisan National Commission on Fiscal Responsibility and Reform to put forth solutions to tackle our nation’s long-term fiscal conditions. The President immediately named Erskine Bowles, former White House Chief of Staff under President Clinton, and former Wyoming Republican Senator Alan Simpson to serve as the Commission’s co-chairs of the 18-member Commission.

For far too long, Washington has avoided the tough choices necessary to solve our fiscal problems – and they won’t be solved overnight. But under the leadership of Erskine and Alan, I’m confident that the Commission I’m establishing today will build a bipartisan consensus to put America on the path toward fiscal reform and responsibility.

--President Obama, February 18th

The executive order followed failed efforts in the Senate to pass a bipartisan Senate deficit commission sponsored by Senate Budget Chairman Kent Conrad (D-ND) and Ranking Member Judd Gregg (R-NH). Unlike the President’s commission, the Conrad-Gregg congressional commission would have had the statutory authority to require an “up-or-down vote” by Congress on the recommendations for entitlement spending and taxes.

The mission of the President’s commission is to identify policies to improve the fiscal situation in the mid-term and to achieve fiscal sustainability over the long run. Specifically, the Commission is to propose recommendations designed to balance the budget, excluding interest payments on the debt by 2015. It is charged with proposing recommendations that meaningfully improve the long-run fiscal outlook, including changes to address the growth of entitlement spending (e.g. Social Security, Medicare, and Medicaid) and the gap between the projected revenues (taxes) and expenditures of the federal government.

The Commission is to approve (by a vote of not less than 14 of the 18 members) a final report to the President by December 1, 2010. The report will provide recommendations that may or may not be taken up by the President or Congress.

The 18-member commission will be composed of 12 members appointed by Senate and House leaders (three each by the Republican and Democratic leaders of both chambers). All must be sitting members of Congress. The additional 6 members will be appointed by the President, with no more than four from the same political party.

Senate Majority Leader Harry Reid (D-NV) appointed three Democrats February 23rd to serve on the commission: Majority Whip Dick Durbin (IL.), Finance Chairman Max Baucus (MT.) and Budget Chairman Kent Conrad (N.D.). President Obama named his remaining members to the commission on February 26th: Dave Cote, the chief executive of technology firm Honeywell; Ann Fudge, a former chief executive of Young & Rubicam Brands; Alice Rivlin, a former official with the Federal Reserve and the Office of Management and Budget; and Andy Stern, the president of the Service Employees International Union. The remaining members had yet to be appointed at the time LINKS went to press.
ANCOR State Budget Survey: Services Cut
Members are Urged to Respond to Next Survey

ANCOR asks its members to fill out a quarterly survey that asks questions about your state budgets and how they affect your organization and its ability to support individuals with disabilities. This survey is important because staff can take this information to Capitol Hill when meeting with members of Congress. The answers you give help paint a picture, with real people—the people you support, their families, and your employees—of what cuts in Medicaid mean to services and supports for individuals with disabilities. In fact, ANCOR encourages you to talk to your federal lawmakers; the more they hear from you the more they will remember how important Medicaid funding is to the work you do.

ANCOR’s most recent survey yielded 65 respondents and a total of 33 of states. Over half of the agencies that responded to the survey received a cut in reimbursement. To deal with cuts, some providers increased the size of living arrangements and decreased the amount of direct support hours.

ANCOR members report the numbers of individuals on waiting lists continue to increase and in many states no funds are available to provide supports to anyone on the waiting list, while provider capacity to take emergency referrals has diminished.

Many providers have been forced to reduce the amount of support to “essential services,” greatly limiting the participation of individuals in their community and their independence. Defining elements of community life, such as access to social, recreational, and religious opportunities, have become limited or eliminated due to transportation and staffing cuts.

This information is just a snapshot of what ANCOR members report. Specific agency names and those making these reports are kept confidential. We hope as more information is collected over time, we can show more data; however, in the mean time, the information collected in this survey is critical to influencing individual members of Congress. Please watch for another survey in April and take the time to respond. Your influence in Congress depends on it! ●

ANCOR State Budget Survey:
Services Cut
Members are Urged to Respond to Next Survey

ANCOR’s partnership with Aflac, the country’s leading provider of individual health and guaranteed-renewable insurance for more than 50 years, brings the Duck to you and your employees!

As part of the Shared Resources Purchasing Network, ANCOR members can take advantage of Aflac’s extensive roster of competitively priced voluntary insurance products. ANCOR members now have the opportunity to complement their existing major medical plans and other company benefits with Aflac’s 100 percent employee-paid and purchased voluntary policies.

Read the President’s Corner (page 3) in this issue to see how one agency has benefited from using Aflac through ANCOR.

For additional information about Aflac, please visit www.chooseaflac.com/ancorlead, or contact Ross Setlow at Aflac4ancor@aflacny.com or (800) 595-9768. See LINKS ad on page 26 of this issue.

ANCOR Welcomes These New Members

Belmont Management (ID)
Beth Richardson (KY)
CCAR Industries (IN)
Community Connections (KY)
Community Quality Care (OH)
Connections in Ohio, Inc. (OH)
DC Coalition of Providers for Persons with Intellectual and Other Disabilities (DC)
East Bay Innovations (CA)
Eastern Christian Children’s Retreat (NJ)
Human First, Inc. (NY)
Interagency Council of MRDD Agencies (NY)
Langton Green, Inc. (MD)
Milestone Decisions Inc. (ID)
Reeves Foundation, Inc. (AZ)
Rita Wiersma (WI)
Southeastern Behavioral HealthCare (SD)
Whole Life, Inc. (CT)

If one of these new members is in your community, be sure to reach out and extend a warm welcome and make sure they’re taking advantage of the many benefits of ANCOR membership.

Self-Insuring Employees Saves One Provider $500,000 Annually

Sid Blanchard, Executive Director, Community Access Unlimited (CAU) was recently featured in the New Jersey Business News for the proactive approach his agency took over 10 years to control rising health care costs. In this interview, he shares his thoughts on why the organization sought to create a self-insurance program and the benefits derived, including a cost savings of $500,000.

Sid Blanchard can be reached at sblanchard@caunj.org or 908-354-3040.

Think Beyond the Label

Perhaps you’ve seen the commercial where the woman in a wheelchair describes the disabilities of her coworkers. One talks too loud because he has volume control disability. Another dresses horribly because she has a fashion disability. The narrator describes herself as having a coffee-making disability, as we watch her colleagues spit out the vile brew all over the office.

The commercial is part of a clever campaign called Think Beyond the Label, sponsored by Health and Disability Advocates. Their website: http://www.thinkbeyondthelabel.com/ includes lots of useful information about employing people with disabilities, including:

• Data on the ROI of hiring people with disabilities


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**Legislative Update: Workforce and Health Care Reform**

While the members of the House and Senate prepare to get back to Washington and tackle the conferencing of their respective health reform bills, ANCOR staff continues to work with Congresswoman Capps to raise awareness and increase the number of co-sponsors on the workforce bill (HR 868). As of January 18, 2010 there are 59 co-sponsors including 13 Republicans and 46 Democrats.

The NAC Steering Committee met in early January to reassess, among other things, its current and future legislative goals and revisit the long and short term objectives of the campaign. As directed by the committee, ANCOR staff and volunteers will continue to push for HR 868 and add additional cosponsors with emphasis on achieving a congressional hearing on the workforce issue this year.

Thanks to the direct outreach of ANCOR members whose efforts continue to grow support for the workforce wage bill – please keep it up! Please visit the ANCOR Action Center at www.ancor.org to contact your U.S. Representative and urge them to co-sponsor H.R. 868 - TODAY!

YAI Named Winner of ANCOR Advocacy Award

In February, ANCOR announced YAI National Institute for People with Disabilities as the winner of the Direct Support Professional (DSP) Capital Challenge and recipient of its annual ANCOR Advocacy Award.

Through the NAC, ANCOR launched the DSP Capital Challenge in the fall of 2009 as a competition among its membership to generate contact with Members of Congress in support of H.R. 868, the Direct Support Professional Fairness and Security Act.

The Capital Challenge competition was successful in facilitating close to 600 unique constituent contacts from DSPs, family members and consumers to Washington lawmakers, helping to raise awareness of the critical supports DSPs provide each day to millions of Americans with disabilities. During the three-month competition, H.R. 868 experienced an increase of thirty-three new co-sponsors bringing the current total to 59.

“Each year, the ANCOR Advocacy Award highlights the incredible work of our membership in affecting change for the direct support workforce and shaping the future of the profession,” said Renee Pietrangelo, CEO of ANCOR. “On behalf of ANCOR, I am pleased to recognize YAI’s support of the NAC’s goal to seek funding and other solutions that would mitigate the worsening direct support workforce crisis.”

As the award winner, a YAI representative will be sent to ANCOR’s 2010 Management Practices Conference and Trade Show in New Orleans, LA (April 11-13) to receive the prestigious ANCOR Advocacy Award and be honored for outstanding leadership and advocacy on behalf of the direct support workforce.

“It is gratifying that so many of YAI/NIPD’s families, staff and direct support professionals reached out to their Congressional members on behalf of all DSPs across the country. By partnering with ANCOR and its members, our collective voices carried a powerful message about our most valuable resource – DSPs,” said Dr. Philip H. Levy, President and CEO of YAI/NIPD.

NAC Grassroots Activism

A key component of the National Advocacy Campaign is strengthening our grassroots network and engaging a broader audience of stakeholders to advocate on behalf of higher wages for the direct support workforce.

The NAC has been successful since its inception in 2001, due in large part to an active and vocal base of support. Now, more than ever, we must continue to grow that base. ANCOR has launched several grassroots programs over the years to recognize and engage DSPs to be leaders in communicating with decision makers on the workforce issue. Such programs are instrumental in our capacity to effectively convey the need for higher wages and the real threat not addressing the workforce crisis will have on the ability of providers to meet the needs of their consumers.

ANCOR will continue to grow our “grassroots army” and advocate for higher wages for DSPs, but we can’t do it without the help of our members. We encourage agencies to become active in the NAC and engage their DSPs, and the families of their consumers, in this campaign.

Please take the time and join the NAC through our website: www.youneedtoknowme.org. Sign up to receive emails and we’ll keep you informed of current events and ways to get involved!

Direct Support Professionals Wage Study

In partnership with the Mosaic Collaborative for Public Policy and Practice, ANCOR has again commissioned a national study comparing entry level and average wages for DSPs.

The purpose of the survey and study is to gain credible data related to growing wage disparities to illustrate how that impacts high turnover rates and the overall workforce shortage.

Initial analysis of survey results substantiates our claims of a stark disparity between state and private DSP wages, and strengthens the statistical data for our work to increase DSP wages, training, and technology. Results of the study will be available online soon. Be sure to visit www.ancor.org for more information.

Be a hero in your agency! Use the Shared Resources Purchasing Network

to save money, and earn money, while making important purchases.

Find out more at http://www.ancor.org/srpn
Introducing... accurate, individualized documentation.

CareTracker’s innovative, electronic documentation system helps providers across the country:

• Reduce Risk
• Save Time
• Improve Quality of Care
• Improve Communications

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Many ANCOR providers are asking themselves that question. Many others don’t know that much about it. The two things both groups have in common are saving money and saving programs - with both priorities at the top of their 2010 lists.

ANCOR’s Shared Resources Purchasing Network (SRPN) was created to help members give new life to their disappearing budgets and mission related programs.

By applying ANCOR’s strength in numbers, SRPN leverages its members’ collective buying power to stimulate dramatic discounts on everything from printing services and office supplies to household appliances and phone charges and more. We call the SRPN ANCOR’s year ‘round stimulus package and you’ll call it your agency’s lifesaver!

The good news is the SRPN is free to all members – even State Associations and their members can participate. All members have to do is activate their participation. And it’s easy. Simply fill out the request form and choose the various national vendors you’d like to learn more about, and voila …they will contact you!

Would you like to know about the special discounts we’re arranged with Sears, OfficeMax, Medline, Dell, Carrier Access, AFLAC, Navtrak, IKON, Furniture Concepts, US Bank, BCS Recycling, Philadelphia Insurance and/or the Nonprofit Trust? Click here.

A Few Fringe Benefits—And Something You Won’t Find With Other “Buying” Groups!

Where appropriate, the savings generated through SRPN is also available as a perk to your agency staff, their families and persons served. And best of all…Every purchasing partner strongly encourages employment opportunities for people with disabilities.

What have you got to lose? Start saving for your agency today!

Visit the SRPN exhibits and meet the partners in the special SRPN section at the MPC Trade Show in New Orleans. Also plan on attending the special breakout session “Maximizing ANCOR Membership” on Monday, April 12, 3:30-4:30PM.

Questions? Contact Marsha Patrick, ANCOR’s Development Director, at mpatrick@ancor.org or 703-535-7850 x 110.

Free Webinar:
Assuring Protection from Cyber Liability

Mark your calendars for this important complimentary webinar for ANCOR members.

March 25, 2-3PM:
Assuring Protection from Cyber Liability

Presented by Philadelphia Insurance

Designed for executive directors, CFOs, HR executives and those responsible for benefits, this webinar will focus on the need for and scope of Cyber liability insurance to protect organizations from:

- Loss of Digital Assets
- Non-Physical Business Interruption
- Cyber Extortion and Cyber Terrorism
- Network Security and Privacy Liability
- Employee Privacy Liability
- Electronic Media Liability

Our featured speaker is George Schalick, AVP of Underwriting at Philadelphia Insurance.

Philadelphia Insurance is nationally recognized as a member of Ward’s Top 50 Benchmark group of Property/Casualty insurance companies for outstanding achievement in the areas of financial strength, claims performance, and consistently favorable underwriting results.

This is a members-only complimentary webinar brought to you by ANCOR and Philadelphia Insurance Companies. Click here to register. Questions? Contact Marsha Patrick at mpatrick@ancor.org.

The price of the democratic way of life is a growing appreciation of people’s differences, not merely as tolerable, but as the essence of a rich and rewarding human experience.

--Jerome Nathanson
Self Determination, Self Direction
First in a Series of Articles Exploring the Many Facets of Self Direction

by Diane McComb

Over the next several months ANCOR will explore the many facets of Self Direction in a series of LINKS articles.

Ask someone in the field what the term means, and you’ll get a host of answers, including answers that use “Self Direction” and “Self Determination” interchangeably. As we kick off our discussion of Self Direction in 2010 - and why it is important for ANCOR members - we must understand the differences between “Self Direction” and “Self Determination.”

Truth be known, CMS does not define self determination; and, while it references self-direction in the context of Home and Community Based Services 1915 (c) waivers, it actually defines “Participant Direction” at the back of the HCBS waiver Technical Guide as the provision of the opportunity for a waiver participant to exercise choice and control in identifying, accessing, and managing waiver services and other supports in accordance with their needs and personal preferences.

For many, self determination is a broad philosophy whose values of freedom, authority, support and responsibility are the underpinnings of best practice today. Self determination can be respected and supported without necessarily requiring an individual to self-direct their supports. On the other hand, self-direction may focus more on one’s supports as they specifically relate to budget authority -- more narrowly focused on a specified subset of supports, the hiring/hiring of support staff, and control of the budget for those supports. If we re-read the definition above from CMS for participant direction, we could actually be talking about the same thing.

While it might seem unimportant to pin down definitions, it is important in the context of conversations with public policy and elected officials. There are multiple service-specific references to self-direction interspersed throughout Medicaid policy which to State Medicaid personnel, may actually define what self-direction means to them. Cash and counseling is a good example. States that participated in one of the cash and counseling demonstration projects may have come to think of self determination as the provision of personal care services in one’s home, the ability to hire and fire the care attendant, and giving cash to the person with the disability. At the same time, that example may not come close to defining the spirit behind self determination.

If this sounds like a confusing game of semantics, it is. Yet, as the applications of self determination, self-direction, and/or participant-direction are explored, people with disabilities will be better served if there is awareness that while the terms might be used interchangeably, not everyone will have the same understanding of the meaning behind the terms. As states move to mitigate the effects of the recession, discussion is focusing on new and old ways to manage services and supports, to control costs, and improve the satisfaction of people being supported by the system. The term of self-direction is used almost euphemistically. Some perceive it as code for less

See Self Direction, page 15.

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Tired of managing the survey process? Wish there was a better way?

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Members who use Deyta for their survey administration will receive a $500 discount off the license fee.
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Jenn Bauer
National Director, Business Development
Toll Free: 888.893.1937 x 138

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The Satisfaction Experts!
money being available for support budgets. Others embrace it as the only way to capture the full measure of dignity people with disabilities deserve.

This series will look at the many facets of self-direction including the origins of waiver authority, employer versus budget authority, satisfaction surveys of individuals being supported and how states are implementing self-direction. Readers will learn about Consumer-Directed State Plan Personal Care Services, Home and Community-Based Services Waiver Programs (1915 c), Home and Community-Based Services State Plan Option (1915 j), Self-Directed Personal Assistance Services State Plan Option (1915 j), Cash and Counseling, Independence Plus waivers, managed care, and the implications for self-direction in the future. Stay tuned…

Partnerships for the Future will only be successful if they focus on common issues of access that face our nation, and develop strategies and solutions that can benefit ALL. Issues that face our country such as employment, housing, transportation, and education are important to all in our communities, not just people with disabilities. Organizations and advocacy groups for people with disabilities will need to reach out to other groups in our communities who are also struggling for strategies to address these issues.

Self advocates bring a unique perspective to the table having personally experienced discrimination and lack of access to employment, housing, transportation and education.

Examples of Partnerships for the Future that involve self-advocates may include:

Self advocates working with Direct Support Professionals to have them recognized as true professionals, just like doctors, nurses, social workers and lawyers. These professionals can offer supports and services to people with disabilities and the elderly in more cost effective ways than our current systems of home health care.

Self advocates and organizations supporting people with disabilities become involved with community economic development groups addressing education, workforce issues and employment opportunities.

Self advocates and organizations that support us may partner with AARP to eliminate the marriage penalty under the Social Security Act.

In the future, our partnerships must embrace self advocacy groups as unique and equal partners, and recognize that others cannot speak for us or become us.
Making Technological Investments: How to Do It and Do It Right

By Rodney Bell

A service provider needs to upgrade its information system. A professional helps a family pick a device to guide and prompt a loved one with a disability. An organization considers a smart-home for its residential setting. Technology can help us support consumers with disabilities – if we do it right. If we don’t, promising technology can create more problems than it solves. Are you planning to invest in new technology for your consumers or organization? (N.B. Considerations differ for those who would develop homegrown technology, rather than buy commercial products.) How will you approach this challenge?

For providers, the goal is to implement cost-effective solutions that support organizations and consumers with better ways of working and living. Here are key concepts for doing this.

- Invest regularly, not ad hoc, in new technology: it amplifies staff abilities and makes consumers more able.
- Make the user king: center your adoption of technology on those who directly benefit. To get results, follow a sensible process for implementing solutions.
- Organizations and technology co-evolve: implementing technology is continuous process improvement.

Things turn out better with a plan. From my work with organizations, I recommend following a process as systematic as the technology is expensive.

**Key Questions**

**Experience shows providers must focus on the answers to these key questions:**

- What are the benefits? A government agency implemented an information system for field offices, but expected quicker intake. Measurements disappointed, until they realized the benefits they sought came from using information, not in data capture. My survey of case managers showed greater efficiency and quality using electronic data than paper. There was a clear benefit. However, offices were slow to adopt the new system. The agency renewed promotion and support for system use. Lesson: know what benefits to expect, work to get them, and measure results.

**How much is too much?** Fascinated with technology, an innovative provider pioneered an extensive homegrown, combination smart-home and information system. New features outpaced the organization’s ability to use them. The explosion of features jeopardized the provider’s financial viability and investor interest in funding a vendor start-up. The provider eventually spun off the technology business to grow at a customer-driven pace.

- How do you measure benefits? A large, long-term care organization approached emerging technology with caution. They set up a comparative study, implementing the new system in a portion of a new residential setting and comparing work and outcomes with the traditional portion. This approach made the benefits of the new system clear and quantifiable. After some adjustments, the organization expanded the system to the entire organization.

**Takeaways**

Treat technology as investment on a par with human resources: it leverages their abilities. Adopt technology on pace with your experience and risk-tolerance. Become expert in implementing new technology: learn to live with it.

AUTHOR LINK: Rodney Bell is a consultant to the Coleman Institute for Cognitive Technology and Principal Asset Consulting, LLC. He can be contacted at (503)307-2299 or assetcon@easystreet.net.

“Thanks to the discounts we received from Medline, we were able to renew our ANCOR membership. In this time of economic crises and funding challenges, Medline has proven to be an effective partner in helping us realize savings.” - Carol Lee, Executive Director, Harry Meyering Center, Inc.

Click here to learn more.
Join the Celebration!
Send ANCOR an Anniversary Greeting

It’s Our Anniversary; Send us a Card

That’s right. As you should all know by now, in 2010 ANCOR celebrates 40 years as the association of community providers of supports and services to people with disabilities.

We’re looking forward to a year of celebration, including the kick off at the Management Practices Conference and Trade Show next month (See here for details and to register) and the gala celebration planned for the fall (details on that will come later.)

Right now, we’d like to get all our members in on the act by inviting you to send ANCOR birthday greetings.

We’ll be using the new ANCOR Connected Community (ACC) to collect your well wishes.

Simply go to http://ancor.connectedcommunity.org.

If you are not already logged in to the ANCOR Connected Community, you’ll see a screen that looks like this:

Simply enter your email address and password.*

**Float your cursor over “Discussions” in the top navigation bar to release the drop down menu. Select “Post Message.”

On the Post Message page, select “ANCOR 40th Anniversary” from the drop down list of Discussions beside “To.”

Enter your message and hit “Send” at the bottom.

Notes on Using the ACC

*The email and password combination for access is the same one you use to access members-only portions of the ANCOR website. If you don’t yet have a password, click here to get one.

**The first time you log on to the ACC you’ll have to agree to our site rules of etiquette. Just scroll down to the bottom of the page and select the correct button.

Then you’ll be taken to the main page of the ACC. From there you can follow these instructions to leave an anniversary greeting. You’ll also want to update your profile, subscribe to discussions, and more.

We invite you to take a look around.

Here are some instructions on how to use various parts of the site. (Once you’re in the ACC, all of these documents are available in the library called “ANCOR Connected Community.”)

Here’s a guide to getting started and setting up your profile.

Here’s a guide to joining in discussions.

Here’s a guide to finding contacts in the community.

Here’s a guide to sharing documents in the community.

Look for more LINKS articles and emails in the future telling you how you can get involved in celebrating ANCOR’s 40th anniversary, and how you can use the ANCOR Connected Community to get greater value out of your ANCOR membership. Enjoy! ♥
Social Solutions has joined the ANCOR partner program. As an ANCOR Platinum level partner, Social Solutions will make its ETO (Efforts-to-Outcomes) software available to members at a discounted rate, with pre-defined templates and reports which feed directly into the Performance Excellence Initiative that is managed by ANCOR and DEYTA. This ground-breaking initiative enables ANCOR members to participate in a nationally recognized benchmarking program and provide a higher quality of service to their participants without the additional level of effort typically required for compliance and reporting purposes.

Members will receive a much higher level of visibility and funding as a result of this program. And by using ETO, members can gain benefits similar to what Social Solutions’ customers are already experiencing:

- Improved performance in community-based service work
- Dramatically increased funding
- Significantly decreased manual reporting efforts

Social Solutions, Inc. is the leading provider of performance management software for the human service sector. Thousands of organizations use our ETO software to assist over four million participants with youth service, workforce development, family service, health and other critical social service programs.

To learn more about this program, please email ancor@socialsolutions.com or visit www.socialsolutions.com/ancor.
ANCOR needs your help with recruitment in 2010, and we’re offering a sweet incentive – up to $1,500 for your agency - to those of you who demonstrate your powers of persuasion by recruiting new ANCOR members.

As a member, you are in a unique position to share with other providers the benefits you’ve realized as a part of our community of community providers. Studies indicate this kind of one-on-one approach can be much more effective than even the most energetic membership campaign by staff.

And ANCOR is ready to support and encourage you in two important ways.

First, we’re offering incentive bonuses to any member who recruits another member.

• Recruit one member, and ANCOR will send you a check for $250.
• Recruit a second member and ANCOR will send you a check for $500.
• Recruit a third member and ANCOR will send you a check for $750.

Do the math! By simply recruiting three members from your community, you could earn an extra $1,500. Think of the things you could do with that money. Here are a few suggestions.

• Replace a line item you’ve cut from your budget
• Invest in technology to help you improve quality and efficiency
• Reward the person who did the recruiting
• Take the people you serve on a special outing
• Hold an event to thank your community

Second, we’re going to provide you all the tools you need to be a successful recruiter.

What do I say? Want to recruit, but don’t know what to say? We’ve got a set of talking points you can use. You got a copy by mail; email us if you need another.

What do I do? Looking for ideas? We’ve started a list and again, we mailed you a copy and will send another on request.

Anything else? Of course. We’ve prepared an ANCOR Stronger Voices Recruitment Kit, including:

• ANCOR Video. A picture says a thousand words. Share this video.
• ANCOR Brochures – one general overview, one with a dozen reasons to join
• Copies of past LINKS (limited quantities, while supplies last). March, April, September, October

The original mailing included a reply postcard for recruitment kits. If you’ve misplaced yours, just email a request and we’ll get your supplies in the mail to you.

Important: To receive credit for your recruitment, the new member must supply your name and agency on page 4 of the application form.

(Note: In the event a recruit credits two or more agencies, we’ll split the check!)

Keep this in mind.

The point of this exercise is to help ANCOR, while helping your own agency. It’s important business, but we want you to have fun while you’re at it. Meanwhile, if it’s recognition you crave, we’ll be announcing your success in LINKS and, if you’re part of the ANCOR Connected Community, you’ll have the Star Recruiter badge to add to your profile. (Note: The ANCOR Connected Community is new, and the subject of separate emails from ANCOR.)

If you have questions about the Stronger Association, Stronger Voices Campaign, please contact a member of the ANCOR membership team.

Jocelyn Breeland jbreeland@ancor.org
Jerri McCandless jmccandless@ancor.org
Marsha Patrick mpatrick@ancor.org

Good Luck!

A lot has changed since 1970.

We’ve got a new way to get connected.
ANCOR Connected Community

http://ancor.connectedcommunity.org
Join us in New Orleans for the College of Direct Support’s 5th annual Administrator’s Forum on the opening day of the 2010 ANCOR Management Practices Conference and Trade Show -- April 11-13 -- at The Sheraton New Orleans Hotel.

The CDS Administrator’s Forum, which is free and includes a complimentary lunch, is open to anyone who wants to learn more about the CDS online curriculum and the Learning Management System. The Forum will be held from 10 a.m. to 4 p.m. on Sunday, April 11, and registration at the hotel will begin at 9:30. People should consider registering in advance for the Administrator’s Forum by contacting Donna Kosak at 1.877.353.2767 (toll free) or email her at donna@collegeofdirectsupport.com.

“Our Administrator’s Forum is a time for hearing from our end users and sharing best practices and allowing our team to discuss changes and new courses upcoming,” said Bill Tapp, National Director of the CDS. “This will be interactive in nature and it gives our users and those interested in the CDS an opportunity to ask questions of our team and of the team from the University of Minnesota that authors our courses.”

The CDS is a collaboration of the Elsevier/MC Strategies and the Institute on Community Integration (ICI) at the University of Minnesota. The CDS curriculum is developed and authored by the ICI team at the University of Minnesota.

The CDS team that will be on hand at the Forum other than Tapp includes Tom King, Director of Communications; Michelle Kael, Customer Support Specialist, and Bill Waibel, Director of Business Development/Workforce Development who is new to the CDS team.

Tapp and Kael will discuss our new tools and the new features of the CDS.

From the University of Minnesota will be Amy Hewitt, Lori Sedlezky, Nancy McCulloh, Kristin Dean, Susan O’Nell, and Derek Nord. Hewitt and her team will discuss new course development and take questions about the content and describe how new courses are developed. Nord oversees and coordinates the Evaluation Briefs of the CDS and he will talk about that process and how the evaluations are done and used.

Among the topics to be discussed by the CDS team is:

- New courses to be released in 2010.
- New tools on the Learning Management System.
- How others are using the CDS and the tools.
- Stories from the field told by end-users of the CDS.

You do not need to be an ANCOR member to attend the Administrator’s Forum. However, if you do attend and plan to stay for the conference you will need to contact Jerri McCandless at ANCOR in order to get the discounted hotel rates for the conference. You can call McCandless at 703.535.7850, Ext. 107, or email her at jmccandless@ancor.org.

During the conference, ANCOR will present and recognize the Direct Support Professional of the Year award and the ANCOR Foundation Community Builder Awards. Also to be unveiled during the conference is the new ANCOR Foundation Leadership Circle program. The Sheraton New Orleans Hotel is at 500 Canal Street and the discounted room rate is $185 and you must ask for the ANCOR Room Block. You need to call 504-595-5514 or 888-627-7033 and identify yourself as a member of the ANCOR Group to reserve your room.

Early bird registration is underway and will be available until March 19. The conference fee for ANCOR members is $595 and $895 for non-members. There will be a $50 charge for cancellations on or before March 19. No refunds will be issued for registrations cancelled on or after March 19. Substitutions will be permitted. For 3rd and subsequent ANCOR members who are attendees, the fee is $525.

No man ever reached to excellence in any one art or profession without having passed through the slow and painful process of study and preparation.

-- Horace
Don’t Delay!

Register here today!

Join ANCOR for our 2010 Management Practices Conference
April 11-13, 2010
New Orleans, LA

By Diane McComb, Liaison to State Associations

The best that can be hoped for disability budgets this year is that funding will hold steady, or only be cut two to three percent over the prior year. Indeed, a handful of states are staring down potentially dramatic reductions in funding, and should the federal Senate fail to enact legislation to continue the FMAP enhancements to states, many more will see draconian cuts to supports for people with disabilities.

The recession is old news by now, with all but two states – Montana and North Dakota – dealing with operational deficits. Montana has also now declared a revenue shortfall without the continuation of the FMAP funding. A recent analysis by the Center on Budget and Policy Priorities projects that states are facing aggregate deficits of an additional $140 billion over what has already been cut and this amount reflects the hoped for extension of FMAP before Congress. Further, the analysis suggests that should states address this deficit primarily with cuts to state funding to safety net services with no new revenue measures, the economy could lose as many as 900,000 jobs nationally. The analysis suggests that a balanced approach would be far more useful in moving through the remainder of this recession. Read the full report here.

A six month extension of FMAP could take a little pressure off some states whose governors have built those revenues into budgets submitted to their legislatures. For ANCOR members nationally, it’s all hands on deck; members must advocate forcefully as a way of mitigating extenuating state budget circumstances. It’s also important to note that FMAP is only a temporary stop gap measure. Six months from now, states will be in the same situation if recession markers don’t improve dramatically.

Around the states, a handful are looking at modest increases in Medicaid spending as a result of the FMAP extension, but for the most part, disability programs see little of this. The budget balancing strategies governors are using include an increased reliance on using rainy day funds, raiding other targeted funds such as transportation trusts, workers’ compensation funds, and more. Gambling revenues, although down in most states, are shoring up basic human services and education. Some states are backing increases to alcohol and cigarette taxes. Oregon has even passed a tax measure to assess the wealthiest citizens of that state, though most state legislatures are loathe to enact new taxes in an election year.

Multiple states are looking at restructuring long-term care services and supports to come under a managed care framework. State associations attending January’s retreat heard a great presentation from Bob Stein, (Michigan’s State Association View

State Budgets in Disarray Around the Country

See State Associations, page 22.
association) about the pros and cons of managed care in that state. A copy of his presentation is available to ANCOR members in the ANCOR Connected Community. Click here to go to the document. (You will need to use your ANCOR password to access the community and the document.)

ANCOR will be providing more information about states using this strategy in future LINKS articles.

Maine is looking into expanding the provider service tax to include case management, since it already covers all other waiver services. They are also exploring whether areas in the mental health arena might benefit, as well. In Pennsylvania, people with IDD are looking at a 1% reduction in waiver services. Though it is not yet clear precisely how this will be implemented, there will be a loss of over $17 million to existing services funded under the Consolidated and Person/Family Directed Supports waivers. Kansas is facing a 10% cut across all Medicaid services, while North Carolina is battling a 20% cut to some services for people with mental illness and IDD.

National policy experts are urging states to take a balanced approach, arguing that simply cutting safety net services does little to balance budgets; rather, that approach adds to the Medicaid and public assistance roles in addition to creating untenable circumstances for a state’s most vulnerable citizens. Multiple states have legislation pending to increase a variety of tax measures. Over thirty states have either passed or are considering measures that will increase taxes on personal income, business sales, and excise taxes. Added to the ARRA funding and increased FMAP, some states are faring better than others. (CBPP, 2/10)

At least twenty-five jurisdictions have cut programs and services to people with disabilities or the elderly according to another study put out by the Center on Budget and Policy Priorities. ANCOR members report reduced or eliminated funds in family supports or other programs funded with state only funding (minimizing the overall cut since no federal funding matches state general funds). Likewise states appear to be cutting welfare assistance to adults without social security or SSI benefits for the same reason. Home health care (an optional state plan service in many states), personal care, and other low level support programs are being reduced.

ANCOR will continue to provide updates on how the states are faring as legislative sessions move forward.

Excellence can be obtained if you:
...care more than others think is wise;
...risk more than others think is safe;
...dream more than others think is practical;
...expect more than others think is possible.”
Employees with multiple rates of pay? Shift differentials and premiums? Weighted overtime? Too many hours spent manually calculating wages and hours? Read on!

Providers who serve people with disabilities have to get creative with payroll. We should know...we serve over 800 people each year with disabilities. Our direct care and other professionals have multiple rates of pay, work in multiple locations, and are subject to weighted overtime standards. This is why we created the perfect payroll system to solve the complexities of ID/DD provider payroll and it's now available to you.

The payroll system can handle both client and staff payroll in one package. Subminimum wage, including piece rate and percent of prevailing wage, is no problem. System-calculated overtime including weighted overtime concepts is handled with ease! Integration with a HR package saves countless hours. Learn your payroll expenses at the click of a mouse by site, wage type, and more!

Harness the Power of Knowledge
- Hundreds of Payroll report combinations are available to provide you with the information you need
- Examine payroll expense by cost center and review:
  - Hours  •  Taxes  •  Paid Time Off (PTO) balances
  - Wages  •  Deductions  •  And much more!
- Exception reports detail out-of-the-ordinary events like:
  - Employees with multiple checks
  - Active employees not getting checks
  - Employees receiving overtime with less than regular hours worked
  - And much more!
- Built in PTO to accrue, assign, track, relieve, and report employee leave
- Ability to handle wage tax reporting (W2) in house or outsourced

Unmatched Flexibility
- Unlimited wage types (regular, overtime, holiday, etc.) work in conjunction with multiple base rates (normal, sleep, multiple job titles with different pay rates, etc.) to provide limitless options
- Payroll module allows non-payroll reimbursement within the payroll check; eliminate the need to cut multiple checks and lessen the hassle of pay that is not subject to taxes and deductions
- Easily integrates with third party electronic timekeeping systems
- Ability to integrate with a fee-for-service billing system (pays employee and bills funding source in one process)
- Reprocess or reprint EFT and check payments with ease

Solana™ is the creator and exclusive provider of an industry-specific software package for agencies that serve people with intellectual and developmental disabilities. The software package is made up of 14 modules that assist providers with tasks in accounting, payroll, billing, human resources, fund raising, incident tracking, client demographics, program planning, and other administrative functions. The modules work together to share data electronically and eliminate multiple re-entries of the same data in unrelated software programs. Solana also provides services related to the software such as project management, consultation, implementation, training, ongoing support, and innovative services like hosting and electronic data collection for additional processing inside the software. Solana’s software package is a “must see” for any executive looking to improve operational efficiency.
In the beginning there was no ANCOR. Many CEOs of private agencies that supported people with intellectual disabilities met annually at the conference held by the American Association on Intellectual and Developmental Disabilities (then called the American Association on Mental Deficiency – AAMD.) These providers grumbled to each other about the program content, which was targeted to the staff of the large state institutions that seemed to monopolize AAMD. They sought information that was more suited to their specific needs. Most of these CEOs operated large private schools or other traditional single-site agencies that supported more than 100 people. Some were members of state provider associations that represented private agencies, and some operated small group living arrangements. After a few years of meeting together informally, they converted their discontent to action and in 1970 formed what was then called the National Association of Private Residential Facilities for the Mentally Retarded (NAPRFMR) – quite a mouthful, and the acronym was unpronounceable. The name also was not politically correct, but people first language had not yet come to the forefront. The field of disabilities has come quite a long way since then and ANCOR (NAPRFMR’s successor) played a significant role in this progress.

As the providers were organizing their new association they realized staff leadership would be required and they learned a longtime professional in the field of mental retardation, Manford A. Hall, was available. He had recently served as an interim director for what was then the National Association for Retarded Children, now The Arc. Manny lived in the District of Columbia and his home office became ANCOR’s first office. He had many friends in the right places and negotiated with Doris Haar, who worked for the Department of Health, Education and Welfare (now Health and Human Services) to obtain funding for research that would also fund staffing for the fledgling organization.

See Beginning, page 25.
Beginning, from page 24.

NAPRFMR became an official entity on September 18, 1970. The incorporators were:

- Albert F. Schmickel, Director of the Stonegate School in Connecticut;
- Dr. Erwin Friedman, The National Children’s Center, Washington, DC;
- Martin Van Hook, Elmar Schools in Delaware;
- James O. Vammen, Ken Crest Centers, Pennsylvania;
- John C. McIvor, Cedars Development Foundation, California; and
- William R. McKim, Jr., Foster School, New Jersey.

These six people and seven others served as the first Board of Directors, with A.F. Schmickel as its first President. The seven additional Board members were:

- Dr. Harold Barbour, Woods School, Pennsylvania;
- Don A. Boyer, Handicapped Village, Iowa, who became the association’s second President;
- Gene Langan, Keystone Training and Rehabilitation Residence, Pennsylvania;
- Clayton Lorenzen, Valley of the Sun School, AZ;
- John C. Mueller, Beverly Farm Foundation, Illinois;
- Robert Scanlan, Miami, FL; and
- Ellen Turnbull, Pines School, Wisconsin. Turnbull was the only woman on NAPRFMR’s first Board, but others soon joined her.

The newly organized association was able to negotiate with the AAMR to develop some specific program content that reflected the interests of private providers and ultimately a Division on Private Residential Facilities was formed. Program content now reflected their interests. For a number of years ANCOR continued to hold its annual meeting in conjunction with the AAIDD as a convenience for members who wanted to attend both.

This article is the first in a special 40th Anniversary Series that looks back at the history of the association. The author is a former ANCOR CEO.

The弯 in the road is not the end of the road unless you refuse to take the turn.
--Anonymous

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The National Leadership Consortium on Developmental Disabilities

The 2010 Summer Leadership Institute will be held at the University of Delaware July 11th – 16th 2010.

This week-long, intensive leadership development program is designed for current executive-level leaders and emerging leaders. Participants may work in areas of management or program leadership in organizations that provide, advocate for, or fund supports for people with developmental disabilities and their families.

The focus of the Leadership Institute is on assessing and strengthening leadership skills, setting organizational direction, and understanding the future of the developmental disabilities field. Institute participants come away with demonstrated leadership ability and a firm grasp of the skills and values critical for quality, individualized supports.

Apply now online at www.nlcdd.org. Applications are due by April 12, 2010. For questions e-mail Nancy Weiss at: nweiss@udel.edu.
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U.S. Department of Labor Secretary Hilda L. Solis filed a motion for summary judgment against an agency in Missouri that was contracting with the Kansas City Regional Center (KCRC) to provide housing and companionship supports to people who had previously lived in intermediate care facilities for people with mental retardation. The Secretary’s motion was granted in part and denied in part by the U.S. District Court for the Western District of Missouri.

The focus of the DOL’s investigation centered on whether or not the apartments in which the people with intellectual disabilities were living were “private homes,” as required under rules for the companionship services exemption. In reaching its determination, DOL relied upon decisions reached by the Tenth Circuit Court of Appeals in Oklahoma using a nonexclusive and strict list of factors which go beyond those specifically cited in regulation. Those factors include:

1. **Whether the person who received supports lived in the living unit as his or her private home before beginning to receive services (emphasis added).** This is seen by the court as critical because “the mere onset of services is not likely to change the nature of the living unit.” None of the people supported by this agency ever lived in the apartment development without the assistance of a service provider.

   This author believes that argument is flawed. People who experience the sudden onset of a disability may well have to change living arrangements for a variety of reasons. In addition, those who lived with a family member who provided supports in the family member’s home might well have to move to a different environment if the family member dies or becomes incapacitated, and would then probably have to receive supports from an individual or an agency that were formerly provided by the family member.

2. **Who owns the living unit.** In this case the parties agreed that neither those served nor the agency owned the apartments. The names of the people receiving supports appeared on the leases. This weighed in favor of a finding that the apartments were “private homes,” the court stated, strengthened by the fact that the people who lived in the apartments had legal possession of the property.

3. **Who manages and maintains the residence; such as who provides the essential things that people need to live there like paying the rent and utilities, and providing clean linens, clothing and food.** SSI and disability benefits were used to pay for these items. The agency obtained the leases, and funds were transferred from the state and federal agencies into a single bank account, and rent and utilities were paid from that single account in behalf of all of those who received supports. In addition, employees of the agency were responsible for notifying the apartment manager if apartment repairs were necessary.

4. **Whether the person who received supports would remain in the unit if he or she were not contracting with the provider for services.** While those who lived in the apartments might change service providers it was clear that they could not remain there without having supports provided by some other entity. To the court this: “indicates that apartments [of those receiving supports] were being maintained ‘primarily to facilitate the provision of assistive services.’”

5. **We have always agreed that this factor is key, but not with this particular application.** It seems to us that whether or not the individual requires continuing supports is immaterial. If services could be provided in the same location by a different entity, this factor should not make a difference. However, in this case KCRC required all of the roommates to be served by the same agency, which implies that these apartments are not private homes controlled by the individuals who live in them.

6. **The relative difference in the cost or value of services provided and total cost of maintaining the living unit, including government subsidies.** The court stated that: “This factor is directly related to the purpose for which the living unit is primarily maintained. If the cost/value of the services is incidental to the other living expenses, that weighs in favor of it being a private home. If the cost/value of the services is a substantial portion of the total cost of maintaining the living unit, that weighs in favor of it not being a private home.” In this case the monthly cost of supported services ranged between about $4,000 and $9,000 per person, making it clear that these people could not afford to live as they were without a significant amount of subsidy.

The companionship exemption was designed to help people with few resources remain in their own homes. With this level of assistance one must ask if it is fair to expect direct support providers to forgo protection of minimum wage and overtime requirements. It seems to us that DSPs should not be asked to supplement resources by accepting inadequate wages themselves.

Whether the service provider uses any part of the residence for the provider’s own business purposes. The agency in this case placed its policy and procedure manuals in the apartments “so that it could become accredited by an organization.” The court found that the presence of the manuals was “de minimis” and therefore irrelevant in this case.

In addition to these six factors, DOL stated that several additional factors had merit. These included:

- The fact that the agency had keys to the apartments and this is “contrary to what one would expect in a private residence.”

KCRC required that all people receiving this Comprehensive Waiver funding have a roommate and all roommates had to use the same service provider. The agency’s documents stated that they “acquired” roommates for the people receiving supports, providing DOL with evidence of the agency’s extensive role in managing the living arrangements. As noted above, the fact that all roommates were required to use the same provider and apparently had no say in the choice of roommate(s) added credibility to the decision that these were not private homes.

See **Companionship**, page 28.
Companionship, from page 27

ANCOR Supports 2010 Census
Association Partners with U.S. Census Bureau

Conclusions

The court weighed each of these factors. It said that while those served had “superior rights to possession of the apartments they would not be able to live in the community setting if they did not have a service provider, and their freedom to choose their own living arrangements was curtailed by KCRC’s program requirements.”

Furthermore, the fact that the agency held keys to the apartments prohibited the people who lived there from excluding agency staff from their residences. The agency also was responsible for ensuring that daily needs were met, and the cost of support services greatly exceeded other expenses in maintaining the apartments.

Under these circumstances, the court was convinced that the employees who performed supported services were not exempt from minimum wage and overtime under the federal exemption for companionship services because the apartments were not “private homes.”

While companions were paid more than the minimum wage for all hours worked, those who worked more than 40 hours in a workweek did not receive overtime pay.

Agencies that use the companionship services exemption are strongly advised to obtain a copy of Solis v. FirstCall Staffing Solutions; case no. 08-0174-CV-W-ODS, and to speak to their attorneys about this case.

AUTHOR LINK: Joni Fritz is a Labor Standards Specialist whose guidance is free to ANCOR members and to those who attend a Wage and Hour Workshop or participate in a teleconference that she has conducted. Any ANCOR member who wishes to make arrangements for consultation or workshops with Joni must first contact Jessica Sadowsky, ANCOR Associate Director, Government Relations, for a referral at (703) 535-7850 or jsadowsky@ancor.org.

ANCOR is partnering with the U.S. Census Bureau to spread the word about the 2010 Census. Conducted every 10 years, the census is much more than a population count. Census data are used to reapportion congressional seats to states, and directly affect how more than $400 billion per year in federal funding is distributed to state, local and tribal governments.

Because individuals with disabilities rely on many government and social service programs, accurate representation and funding is especially important. Census data influence the distribution of funding for Medicaid and Housing and Urban Development programs, such as Section 8 Housing Choice Vouchers and the Community Development Block Grant.

A Toolkit for Reaching People with Disabilities is available to help organizations that support people with disabilities communicate the benefits of census participation. Among the available documents are a toolkit overview and 2010 Census Fact Sheet.

Questionnaire Assistance Centers (QAC) will be available to assist those unable to read or understand the census form. For those with visual impairments, Language Assistance Guides will be available in large print and Braille. Deaf and hard-of-hearing persons who do not have access to Video Relay Service (VRS) can call 1-866-783-2010 via FedRelay, a free and confidential federal government communications service. In addition to these options, Language Assistance Guides also will be available in 59 languages at all QAC locations.

By law, the Census Bureau cannot share respondents’ answers with anyone, including other federal agencies and law enforcement entities. All Census Bureau employees take an oath of nondisclosure and are sworn for life to protect the confidentiality of the data. The penalty for unlawful disclosure is a fine of up to $250,000 or imprisonment of up to five years, or both.

We will continue to share information with you about upcoming census events we are hosting, as well as those in our community. Below are key dates for the 2010 Census:

• March 2010: 2010 Census forms are delivered.
• April 1, 2010: Census Day – the official day of the population count. Information provided on 2010 Census forms should represent respective households as they exist on this day.
• April – July 2010: Census workers visit households that did not return the forms to take a count in person.
• Dec. 31, 2010: Census Bureau presents population count to the President of the United States.

Watch for additional details in the coming months, or visit 2010census.gov to learn more.

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News, from page 10.

• State-by-State Resources
• Information about tax breaks for employers

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Human Rights/Disabilities Conference

Registration is now available for the Human Rights and Persons with Intellectual Disablities Conference, April 21 and 22 at the Sheraton Fallsview, Niagara Falls, Ontario, Canada. The conference is sponsored by the Community University Research Alliance. Registration information can be found here, or by contacting:

Brandy Sokoloski
Conference Co-ordinator
Human Rights and Persons with Intellectual Disabilities Conference
(905) 735-0081
conference@3rshumanrights.com

People First Language - A Refresher

With the recent media attention to the language we use to describe people with intellctual and developmental disabilities, it’s perhaps useful to share a reminder about people first language. No one says it better than our friends at Self-Advocates Becoming Empowered (SABE).

Here’s a link to their handy guide to People First language. Print a copy and share it with your staff, and community.

You gain strength, courage, and confidence by every experience in which you really stop to look fear in the face. You must do the thing which you think you cannot do.

-- Eleanor Roosevelt