

ANNUAL REPORT TO THE CONGRESSIONAL DEFENSE COMMITTEES

on the

Activities of the Office of Special Needs – 2017

pursuant to

**Section 1781c(g) of Title 10,
United States Code**



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Executive Summary

The Office of Special Needs (OSN) was established by enactment of the National Defense Authorization Act (NDAA) for Fiscal Year (FY) 2010, Public Law 111-84, October 28, 2009, which added new section 1781c to title 10, U.S. Code. The purpose of the OSN is to “enhance and improve Department of Defense (DoD) support around the world for military families with special needs (whether medical or educational) through the development of appropriate policies, enhancement and dissemination of appropriate information throughout the DoD, support for such families in obtaining referrals for services and in obtaining service, and oversight of the activities of the Military Departments in support of such families.” To effect these purposes, the OSN operates in and oversees three primary program areas: the Exceptional Family Member Program (EFMP), the provision of services pursuant to the Individuals with Disabilities Education Act (IDEA), and the sponsorship and facilitation of the DoD Advisory Panel on Community Support for Military Families with Special Needs. Over the last year, the OSN has continued to make significant progress in all three program areas.

EFMP

To provide a consistent and successful experience for families, regardless of the installation at which they are located or Military Service to which they belong, OSN and the Military Services are employing a deliberate and systematic approach to implementing EFMP standardization efforts. Key initiatives in the last year include:

- ✓ The successful completion of the Family Member Travel Screening (FMTS) forms pilot at 17 military installations. Through the pilot, the Department tested five new standard forms (in place of nine Service-specific forms) for use in screening the travel of ALL families transitioning overseas, regardless of Service affiliation, and regardless of whether a family has previously been identified as having special needs. Results of this pilot demonstrated a significant streamlining of the FMTS process, by eliminating quantity and redundancy of paperwork. Work is ongoing to implement the results of the pilot’s streamlined process Department-wide.
- ✓ Full implementation of the EFMP Data Repository (DR), allowing OSN to assess trends, and better identify and address gaps in services. OSN will continue to refine the EFMP DR in collaboration with the Military Services.
- ✓ Continued development of a standardized core competency training curriculum to ensure EFMP Family Support staff have a standard knowledge base of EFMP and other information related to special needs, and are positioned to consistently communicate such information to Service members, families, and installation-level leadership across the Military Services.
- ✓ Monthly meetings with the EFMP Family Support Working Group to sustain and develop initiatives to support families with special needs. These meetings proved beneficial in determining gaps in services identified by the Military Services.

- ✓ Development and approval of the EFMP Enhancement Plan (Appendix A).

Individuals with Disabilities Education Act

The OSN has oversight of policies and programs executed in accordance with Department of Defense Instruction (DoDI)/ Department of Defense Manual (DoDM) 1342.12, “Provision of Early Intervention and Special Education Services to Eligible DoD Dependents,” which implements provisions of the IDEA for the DoD. Actions taken in the last year include:

- ✓ Chairing the quarterly meeting of the Subcommittee for Inter-Component Coordination (SICC). The SICC deliberated and developed additional efforts to refine and increase compliance monitoring, reporting, and maintenance of programs providing IDEA services.
- ✓ Collaboration with the Service Educational and Developmental Intervention Services (EDIS) programs and the Department of Defense Education Activity (DoDEA) to complete the DoD IDEA Annual Compliance Report.

Advisory Panel on Community Support for Military Families with Special Needs

OSN formally established the Advisory Panel on Community Support for Military Families with Special Needs and developed the Advisory Panel’s quarterly meeting schedule. The Advisory Panel received from its members their first-hand accounts of the services that military families with special needs receive and the challenges they encounter in navigating support programs. Key Advisory Panel actions taken in the last year include:

- ✓ Gathering information and suggestions from the Panel on services for families with special needs, and challenges they encountered when navigating the various and complex systems of support. Panel member discussion and input serves as valuable experiential data from which OSN can guide the enhancement of service delivery.
- ✓ Dissemination of information on current and future OSN/EFMP initiatives. Subject matter experts presented on topics of interest to the panel members at meetings.
- ✓ Utilization of Military OneSource (www.MilitaryOneSource.mil) and the Exceptional Advocate newsletter to disseminate information shared during the Panel meetings so that all families with special needs would have access to the most current and accurate information on issues such as upcoming changes to Tricare and the Family Member Travel Screening forms.

1. Introduction

The OSN operates in and oversees three program areas: EFMP policy across the Military Services, the provision of services pursuant to the IDEA, and the administration and facilitation of the DoD Advisory Panel on Community Support for Military Families with Special Needs.

This year, OSN merged with the Office of Child and Youth, the latter having responsibility for policy and oversight of DoD child care programs and youth activities. This change has fostered collaboration and program insight, thereby increasing the quality of oversight and level of service provided to military families with special needs.

2. Background

The OSN was established pursuant to section 563(a) of the NDAA for FY 2010, Pub. L. 111-84, which added new section 1781c to title 10, U.S. Code. The purpose of the Office is to “enhance and improve DoD support around the world for military families with special needs (whether medical or educational needs) through the development of appropriate policies, enhancement and dissemination of appropriate information throughout the DoD, support for such families in obtaining referrals for services and in obtaining service, and oversight of the activities of the Military Departments in support of such families.” Subsection (g) of section 1781c of title 10, U.S. Code, requires the Secretary of Defense to submit to the congressional defense committees an annual report on the activities of the OSN, not later than April 30th of each year.

The report is required to provide:

- A description of any gaps in services available through the Department for military families with special needs.
- A description of the actions being taken, or planned, to address such gaps.
- Such recommendations for legislative action as the Secretary considers appropriate to provide for the continuous improvement of support for military families with special needs.

This is the ninth annual report submitted since the enactment of section 1781c of title 10, U.S. Code and will address gaps, actions, and recommendations in standardization and oversight activities, as well as outreach and engagement activities.

3. EFMP

EFMP is the avenue through which military families with special needs access the support and resources they need, as they navigate the challenges of military life. OSN establishes policy governing the EFMP and exercises oversight of the Military Services’ execution of their EFMP programs. EFMP compasses three component areas:

- **Identification/Enrollment** (of a family member) with special medical and/or educational needs (completed by medical commands).
- **Assignment Coordination** to ensure the special needs of a family member are considered in the assignment process (coordinated between medical and personnel commands).

- **Family Support** to help families identify and access community resources (generally provided in family support centers).

EFMP is a key focus of OSN and these component areas are best delivered with overarching, Department-wide policy guidance, when services are both standardized and consistent across the Department, and when activities and processes are in place that provide an effective framework for program oversight.

The EFMP serves more than 133,000 military family members with special medical and/or educational needs. Each of the Military Services operates its EFMP independently, leading to challenges in cross-Service coordination and, at times, gaps in support. To address these challenges and to prevent and close gaps in support, the OSN and the Military Services have engaged in a long-term process to formulate and continuously refine program guidance; standardize EFMP policies, procedures, and activities to the greatest extent possible; and provide oversight across the Department to ensure military families with special needs have full access to any and all services, resources, and support they may need.

3-1. Policy Reauthorization

On April 19, 2017, OSN published DoDI 1315.19, “The Exceptional Family Member Program (EFMP).” The revised instruction includes the provision of EFMP family support in every Service, the opportunity for a family to be stabilized in a location under specific conditions, and the formal establishment of the Office of Special Needs, all provisions not previously set forth in Department policy.

3-2. Standardization

Family Member Travel Screening (FMTS) Update

In 2017, OSN and the Military Services piloted a set of five standardized Department-wide forms to guide the identification and screening of any potential overseas or remote stateside travel concerns, which may include medical, educational, and dental needs identified during the FMTS process. During the pilot, transitioning families tested these five standardized forms in lieu of their Service-specific forms. Through this pilot, all active duty families (not solely those with special needs) with permanent change of station orders to overseas and remote stateside locations were able to experience a consistent FMTS process. OSN conducted the pilot at eight stateside and nine overseas installations to test the ability of the forms to integrate into Service-specific processes and requirements. The pilot validated that the improved forms streamlined the process for family members and staff who participated, especially those in cross-Service situations. There were 403 families who completed the screening process during the 180-day pilot (January 30, 2017 – July 28, 2017). As result of the pilot, nine Service-specific forms will be eliminated and replaced with the five DoD standardized forms across the Department.

- **FMTS Follow-Up Training:** Following the completion of the pilot, OSN updated the standardized forms to reflect feedback collected from staff who

participated in the pilot, and OSN collaborated with the participants to outline the next steps for DoD-wide implementation. The feedback collected on the FMTS forms and processes informed the way forward for implementation, and guided OSN's final updates to the forms, which are in the forms publication process.

- **Development of the FMTS Defense Health Agency Procedural Instruction (DHA-PI):** To facilitate DoD-wide adoption of the FMTS forms and processes, the OSN and the Service medical representatives on the FMTS Working Group initiated a plan to develop a FMTS DHA-PI. The DHA-PI will detail the standard FMTS roles, responsibilities, and procedures to be followed by the military treatment facilities upon implementation of the standardized FMTS forms.

EFMP Data Repository (DR)

The EFMP DR centralizes management of EFMP data and improves reporting capabilities for OSN and the Military Services. EFMP was successfully piloted in 2016, and in calendar year 2017, OSN fully implemented the DR and for the first time, began consistently collecting quarterly EFMP data. The data primarily consisted of information on the number of EFMP assignments coordinated, sponsor and family member demographics, and number and type of family support staff. "State of the DoD Special Medical and Educational Needs" dashboards were developed from the data submitted to OSN. These interactive data visualizations depict data across the Services and inform potential Department-wide and Service-specific policy changes, and enable OSN to make data-informed oversight and policy decisions, based on improved access to EFMP performance metrics.

To maintain current awareness of the program and the additional standardization initiatives undertaken, OSN developed a technology-enabled performance measurement roadmap to guide the implementation of standardization recommendations across the EFMP Components and measure the success of the program.

EFMP Family Support Staff Core Competency Training

In 2017, OSN began developing a standardized online EFMP Family Support Staff Core Competency Training Curriculum to assist EFMP Family Support staff in their professional development by creating a more in-depth understanding of the EFMP and other information related to special needs. This training curriculum will provide staff additional opportunities to develop skills essential to the performance of their roles and responsibilities. The training consists of a number of topics, such as a brief for leadership, completing consistent case notes, self-advocacy, Medicaid, and other public programs for individuals with special needs. This common training core also ensures greater consistency in the information families receive, as they move from installation to installation, and regardless of Military Service.

Family Support Process and Outcome Metrics (POM) Project.

The OSN and Military Service EFMP representatives collaborated with Cornell University on the development of a program and family outcome measure for EFMP Family Support

services, to ensure standardized reporting and program effectiveness across the Services. The feedback instrument was piloted to determine if it adequately measured family member satisfaction with EFMP Family Support services, which is key to continuing to meet the intent of OSN statutory requirements. The instrument was validated and determined to be reliable. OSN and the Services are now developing a plan to implement the instrument across all EFMP Family Support Programs. Collected results will be used by the OSN and the Services for oversight, including monitoring resource utilization and policy development.

3-3. Oversight

DoD Coordinating Committee for Military Families with Special Needs

In keeping with oversight requirements established by DoDI 1315.19, (April 2017) and DoDI 1342.12, “Provision of Early Intervention and Special Education Services to Eligible DoD Dependents” (June 2015), the Office of the Secretary of Defense re-energized this committee in 2014 in order to provide integrated oversight of both DoD Instructions. Membership consists of senior leaders whose portfolios contain elements of the EFMP. The committee met in December 2017 to obtain an update on the EFMP and IDEA services and to review a plan developed by OSN (described immediately below) to enhance and improve the EFMP across the Department. The committee reviewed and endorsed the objectives for this plan, which was approved by the Under Secretary of Defense for Personnel and Readiness. The committee also decided to increase the frequency of meetings to quarterly from the required annual meeting in order for senior leadership to have the appropriate level of visibility and support for the EFMP.

The EFMP Enhancement Plan

In December 2017, OSN developed and designed the EFMP Enhancement Plan to guide improvement of the services and support that the Department provides to families with special medical and educational needs. In creating this plan, OSN identified, through a series of interviews and focus groups, certain programmatic and process gaps. Accordingly, the EFMP Enhancement Plan emphasizes four focal areas and specific activities associated with each, all geared to drive program effectiveness, and with a view to providing a full range of support services for military families. An overview of the focal areas follows.

- **Enhance Systemic Oversight:** OSN relies on input from DoD leaders, Military Services, internal and external stakeholders, and most importantly, families with special needs, to gather information on the operation of existing programs, and to assess the effectiveness of EFMP policies and procedures. However, these mechanisms could be viewed as ad hoc in nature. To better ensure the Department is delivering the highest levels of service and support to families with special needs, a comprehensive and systematic approach to oversight is necessary. Some activities in this area include: (1) the implementation of a full oversight framework; and (2) “eyes on” assessment and monitoring of installation-level inspections of EFMP Family Support Programs to ensure these programs are complying with EFMP policies and

procedures, to assess standards of performance, and to identify gaps, trends, best practices, and resourcing and capabilities shortfalls.

- **Drive Standardization:** Each Military Service operates the EFMP independently, and in many cases, the nature and quality of family services and support varies from installation to installation within the same Service. Given the mobile military lifestyle and that our force is ever more “joint,” it is imperative that we minimize the challenges experienced by our families with special needs in the context of intra-Service and cross-Service coordination and support. Some activities in this area include: (1) the development of standards, metrics, and guidance for EFMP program elements and personnel, applicable across the entirety of DoD, in order to provide a consistent family experience and more uniform delivery of services and support; (2) the development of a standardized EFMP Family Support staffing model to serve as a baseline for proper levels of service and support, and resourcing thereof; and (3) the establishment of Military OneSource as the EFMP “go-to” resource, to provide a centralized, one-stop shop for EFMP-related information, resources, and support.
- **Amplify Strategic Communications:** OSN has developed and published numerous resources and tools for families with special needs. However, because many of these resources are not widely known, our military families with special needs are not receiving valuable support and information they may greatly need. Therefore, we must increase awareness and utilization of these resources, as well as of EFMP Family Support services and support overall. Some activities in this area include: (1) development and implementation of a strategic marketing and communications plan; and (2) increased messaging about and collaboration between OSN and the Defense Health Agency/TRICARE to facilitate direct and timely engagement on, and resolution of, all medical care issues ranging from those that are system-wide to those that affect individual families with special medical needs.
- **Deliberate Process Improvement:** There are gaps in EFMP processes across the Department, and OSN must identify those gaps, assess the root cause, and tailor a corrective action plan. Some activities in this area include: (1) a critical assessment, mapping, and gap analysis of the current EFMP processes (i.e., identification/enrollment, assignment coordination, and family support); and (2) implementation of a plan to close identified gaps.

Each of the four focal areas includes numerous specific measurable actions, all associated with responsibilities outlined in title 10 U.S.C. 1781c, including policy and programs for military families with special needs, and reporting requirements. The EFMP Enhancement Plan was developed in 2017, and executed in 2018. Ongoing progress on the implementation of the Enhancement Plan is and will continue to be briefed at the quarterly DoD Coordinating Committee for Military Members with Special Needs, and the outcomes from the Enhancement Plan will be included in next year’s Congressional Report.

Also in 2017, the Government Accountability Office (GAO) initiated an audit of the EFMP. Though the findings have not been released as of the date of this report, we expect that many

of the actions outlined in the EFMP Enhancement Plan will address areas specifically reviewed by GAO.

4. Individuals with Disabilities Education Act

OSN provides policy oversight of DoD's implementation of the IDEA for eligible DoD dependents, ages birth to 21. In 2017, DoD continued to provide early intervention services to children with disabilities, ages birth to 3 years, through the Military medical departments' EDIS programs, and special education and related services to children with disabilities, ages 3 to 21 years, through the DoDEA school system. OSN worked with the military medical departments and DoDEA to ensure implementation of, and compliance with, the IDEA and DoDI/M 1342.12, "Provision of Early Intervention and Special Education Services to Eligible DoD Dependents."

DoD's current IDEA efforts span more than 200 programs world-wide, affecting more than 8,500 children receiving special education and related services, and approximately 800 children and families receiving early intervention services. OSN's efforts to provide oversight and monitoring activities, ensuring improved educational services for children with disabilities, are ongoing. One way OSN ensures the provision of the highest caliber of educational services is through the offering of professional development opportunities to DoD program administrators and service providers through the Military Family Learning Network (MFLN). The MFLN engages military family service providers and Cooperative Extension educators in the exchange of experiences and research to enhance professional impact and encourage professional growth. In 2017, these opportunities included:

- Successful Transition for Students with Special Needs: What Resources are Available to You?
- Successful Transition for Students with Special Needs: Advocating for Universal Design for Learning in Classrooms
- Beyond the Shape Sorter: Playful Interactions that Promote Strong Academic and Social-Emotional Skills

The DoDI/M required the establishment of the SICCC to recommend policies regarding the provision of early intervention and special education and related services. OSN chairs the SICCC, which met quarterly in 2017. In addition to policy development, this committee continued collaboration on DoD early intervention, special education, and related services. OSN, DoDEA, and Service representatives attended all meetings. In 2017, the SICCC identified several issues of importance, which are guiding OSN actions and activities in 2018. These issues included:

- The placement of the EDIS, which is currently managed by the Services' medical treatment facilities;
- Updates to the Inter-Component Operating Procedures, which is a Memorandum of Understanding between DoDEA and the military medical departments on the procedures for referrals and the provision of services;

- The five-year foreign area limitation on tour lengths for civilians serving in overseas assignments;
- Implementation of the ten standardized EDIS forms, as well as the Individual Family Service Plan Process Guidance Handbook that was developed in collaboration with Army, Air Force, and Navy EDIS Early Intervention; and
- Consistency of services across the Services, overseas staffing, funding issues, and potential areas of focus for staffing based on anticipated family needs.

5. Advisory Panel on Community Support for Military Families with Special Needs (Panel)

The Panel was established by Congress in 2011 to provide informed advice to OSN on the implementation of EFMP policy and programs throughout DoD. The Panel's feedback regarding support services for families with special needs assists OSN in the oversight of services and in gathering information to assist in identifying possible trends.

The Panel met three times in 2017 to discuss a number of topics important to military families with special needs.

- To begin the year, OSN delivered to Panel members an overview of DoD Special Needs Programs, including TRICARE and the Extended Care Health Option benefits. Representatives from DHA provided information to the Panel focusing on changes in TRICARE. The Panel was then able to participate in a question and answer session with DHA representatives to collect information to share with Service members and families in their communities.
- During the second Panel meeting of the year, OSN provided the Panel with an overview of the ongoing FMTS standardization efforts. An overview of the FMTS pilot was delivered, including a review of the core issues that the pilot is addressing and the timeline for implementation. The Panel was made aware of existing resources for families navigating the overseas screening process, as well as common screening challenges that families face. The Panel was then able to provide OSN with ground-level insights and feedback for review.
- The final Panel meeting of the year focused on available support for adult dependents with special needs, a topic raised at a previous meeting. The Panel participated in an overview of support available to adult dependents with special needs, including criteria for enrollment and available resources. Members of the Panel were given a comprehensive list of materials to take back to their communities, including a Guide for Adults with Special Needs, the Special Care Organizational Record, fact sheets that provide additional information on available services, and links to training videos relevant for families with adult dependents. The Panel then engaged in a discussion about the

available resources and their experiences navigating the available services, which they noted varied widely state-by-state.

Resources discussed with the Panel were made available through the online newsletter, “The Exceptional Advocate,” to ensure consistent and on-going communication with families. OSN will continue to convene the Panel in 2018 to gain ground-level insights into the experiences of military families with special needs and further identify further gaps in services.

6. Outreach and Engagement

OSN continues to focus on implementing strategies and activities to better communicate with families and service providers, and share key information relative to EFMP and other issues that are important to military families with special needs. In 2017, OSN participated in a number of outreach and engagement activities that included:

6-1. Publishing and enhancing materials and support resources on Military OneSource.

Military OneSource, mentioned earlier in this report, supplements installation-level support and is the Department’s primary avenue for providing resources and support to Active Duty, Guard and Reserve Service members, and their families, anywhere in the world, 24 hours a day, seven days a week. Military OneSource also provides tools and information for installation-level family support and other professional service providers. Additionally, through Military OneSource, Service members and their families may receive specialty consultations with Masters-level counselors who provide issue-specific support for families with special needs. In 2017:

- 110 families per month, on average, participated in a special needs consultation.
- Over 70,000 OSN publications were requested from the Military OneSource Fulfillment Center by military families with special needs, installation EFMP family support providers, and military treatment facilities.

6-2. Collaborating with the Office of the Deputy Assistant Secretary of Defense for Military Community and Family Policy’s (MC&FP) Military Community Outreach Office.

The Military Community Outreach Office provides oversight of promotional efforts for MC&FP policies and programs. In collaboration with the Outreach Office, OSN developed and updated communication plans designed to deliver uniform and consistent information about the OSN, early intervention, special education, and EFMP resources and policies. OSN communicated this standard message with key DoD stakeholders, Military Service Organizations, service providers, and community organizations, using a variety of communication tools.

6-3. Publishing “The Exceptional Advocate.”

“The Exceptional Advocate” is a quarterly newsletter, provided in an electronic format, for military families with special needs, service providers, and leaders (samples are provided at

Appendix B). Every quarter, the OSN publishes articles, resources, tips, and news that Service members and their families can use to remain informed on a variety of special needs-related topics. In 2017, “The Exceptional Advocate” was delivered to approximately 8,000 subscribers each quarter and is housed on Military OneSource for ease of on-line access.

6-4. Updating the *Education Directory for Children with Special Needs*.

The *Education Directory for Children with Special Needs* provides military families who have children with special needs the information they need to make informed assignment decisions and easier transitions. The directory consists of two components:

- The Early Intervention Directory, focusing on early intervention services for children birth to 3 years old; and
- The School-Age Directory, focusing on education services for children with special needs, 3 to 21 years old.

Both directories provide tools and resources to help with the transition to a new location. The Early Intervention Directory summarizes national and state level early intervention trends and includes descriptions of local early intervention service providers. The School-Age Directory summarizes national and state-level trends for special education and includes descriptions of individual school districts.

6-5. Updating the *DoD Directory on Early Intervention, Special Education and Related Services in Outside Continental United States (OCONUS) Communities*.

This directory explains the levels of support in overseas communities for families of military dependents with special educational needs. The OCONUS directory can be used to:

- Review the location of programs in each military community outside the contiguous U.S.;
- Identify the support level offered by programs in these communities; and
- Find out which communities offer specialized services, including early intervention and special education, for children with more severe or low-incidence disabilities

6-6. Collaboration with the MFLN.

In 2017, through MFLN, multiple web-based, professional staff training webinars were presented, specifically focusing on issues relating to special needs. These include:

- Chronic Illness: Empowering Families in the Journey, Parts 1 and 2
- Medicare 2017 & What it Means for You

- Medicaid: Taking Stock of an Essential Program in Uncertain Times
- The Caregiver in the Room: Considerations for Providers Working with Families,
- Many Needs, One Source: Navigating Military OneSource for Caregiver Support
- Hidden Heroes: Caregiver Stress and What to Do About It
- Estate Planning for Families With Special Needs
- When Play is More than just "Playing": Delivering Intentional Instruction through Daily Interactions

6-7. National Disability and Support Organizations.

OSN met with national disability and support organizations both internal and external to the Department. Through these direct and face-to-face interactions, OSN strengthened partnerships and provided information about how the Department serves and supports military families with special needs through programs such as the EFMP. In 2017, OSN met with organizations including Parent-to-Parent USA, National Disability Rights Network, the Branch-Military Parent Technical Assistance Center, the National Institute on Disability and Rehabilitation Research, the DoD Disability Program Managers Working Group, and the Military Health Services Strategic Communications Partnership.

7. Proposed Legislative Action

The Department believes that current statutes relating to services and support to military families with special needs are sufficient, but commits to informing the Congressional defense committees should it identify gaps in special needs policies and programs that could be bridged through new legislation.

Additionally, OSN is taking proactive steps to develop and implement actions and activities that continue to fulfill its statutory requirements in supporting military families with special needs.

8. Conclusion

Service and support programs for military families with special needs are complex, involving policies and procedures spanning the domains of the medical commands (identification/enrollment), personnel and medical commands (assignment coordination), and family support functions. OSN works diligently to oversee activities related to special needs families across the Services, to develop and implement policies and processes to enhance family experiences, and to increase the quality of life for military families with special needs—all with a view to improve mission readiness.

The activities and accomplishments outlined in this report, and other collaborative efforts with DoD and Service representatives, have positioned OSN well to assess and improve service and

support programs for military families with special needs. OSN stands prepared and committed to continue to address and respond to the needs of our military families, and serve as their advocate as they navigate the challenges of military life with a family member who has special needs.

Appendix A

Exceptional Family Member Program Enhancement Plan

Overview: The DoD Office of Special Needs (OSN) is responsible for making policy for, and providing oversight of, the Department’s Exceptional Family Member Program (EFMP). The following information provides an overview of the focal areas (oversight, standardization, communication, and process improvement) and the specific activities associated with each in which OSN will engage to improve the services and support that the Department provides to families with special medical and educational needs. Although each of the four focal areas is separate and distinct, improvements in one area will likely enhance performance in all. This proposal will serve as the launching point for a detailed EFMP “improvement plan,” complete with actions, milestones, timelines, deliverables, and performance metrics.

Enhance Systemic Oversight: OSN relies on input from DoD leaders, Military Services, internal and external stakeholders, and most importantly, families with special needs, to gather information on the operation of existing programs, and to assess the effectiveness of EFMP policies and procedures. However, these mechanisms could be viewed as ad hoc in nature. To better ensure the Department is delivering the highest levels of service and support to special needs families, a comprehensive and systematic approach to oversight is necessary. Accordingly, OSN will:

- Formalize, promulgate, and implement the DoD OSN Oversight Framework (based on requirements for special needs services and support established in 10 U.S.C. § 1781c).
- Accompany Service Headquarters staff on installation-level inspections of family support programs in order to facilitate “eyes on” assessment and monitoring, and ensure that installation EFMP family support programs are complying with EFMP policies and procedures, assess standards of performance, and identify gaps, trends, best practices, and resourcing and capabilities shortfalls.
- Analyze data collected from the EFMP Data Repository and use the results to identify gaps in policy and program services.
- Review questions related to EFMP on the Reserve Component and Active Component Status of Forces surveys, to elicit more effectively the requirements of the special needs families and the efficacy of present day programs and services.
- Initiate a “bottom up” review of DoD Instruction 1315.19, “Exceptional Family Member Program (EFMP),” to identify and address the need for changes, updates, enhancements, and additions to existing policies and procedures.
- Increase the frequency of DoD Coordinating Committee (EFMP oversight body that includes Department-wide representation) meetings from annual to quarterly. Establish a Working Group structure to better address issues and corrective actions identified by the Coordinating Committee.

Drive Standardization: Each Service operates the EFMP independently, and in many cases the nature and quality of family services and support varies from installation to installation within the same Service. Given the mobile military lifestyle and that our force is ever more “joint,” it is imperative that we minimize the challenges experienced by our special needs families in the context of intra-Service and cross-Service coordination and support. OSN will:

- Establish and publicize Military One Source as the EFMP “Center of Excellence,” to provide a centralized, one-stop shop for EFMP-related information, resources, and support, and emphasize availability of one-on-one masters-level specialty counselors for EFMP-related issues.
- Standardize the Family Member Travel Screening (FMTS) process across the Services, by fully implementing Department-level standard forms and instituting standardized processes for better service and additional efficiencies (OSN has reduced the number of forms used for family member travel screening from nine Service-unique forms to five standardized DoD forms).
- Publish and mandate the use of a standard Family Needs Assessment and Services Plan form to ensure a consistent experience for families seeking services and support, regardless of Service or duty station, and ensure the continuity of assessments and plans across Services and installations, all with a view to reducing duplication of effort and the resultant delay of, or diminution in, a family’s access to/receipt of services and support.
- Develop standards, metrics, and guidance for EFMP program elements and personnel, applicable across the entirety of DoD, in order to provide a consistent family experience and more uniform delivery of services and support.
- Establish EFMP Family Support Staff core competency training, and continuing skills and professional development requirements, with demonstrated competencies as a prerequisite to step increases, promotions, or receipt of monetary awards or performance bonuses.
- Develop a standardized EFMP installation “staffing model” to serve as a baseline for proper levels of service and support, and the resourcing thereof.
- Collaborate with the Services to expand and refine standardized terms and data elements to be reported in the EFMP Data Repository, and installation-level utilization and resourcing data. Utilize this data to assess adequacy of staffing levels, identify trends and capability gaps, and develop responsive policies and programs.
- Increase utility of, and access to, Military Families Learning Network web-based trainings for Family Support Staff and families with special needs. Regularly review content, with a view to remaining abreast of families’ evolving needs, and closing potential gaps in the development and marketing of new materials to meet those needs.

Amplify Strategic Communications: OSN has developed and published numerous resources and tools for families with special needs, including many presently available through Military OneSource, the EFMP eNewsletter (“The Exceptional Advocate”), and social media. Resources

for Staff who work with families are also available. To increase awareness and utilization of these resources, as well as EFMP services and support, in general, OSN will:

- Develop a strategic marketing and communications plan. Promote the EFMP across the spectrum of DoD and Service leaders and individual families, by publicizing benefits of EFMP enrollment, the plethora of available services and support, and dispelling myths.
- Kick off a robust, 9 month outreach campaign with a high-visibility “ribbon cutting” and follow-on public rollout of the designation of Military OneSource as the EFMP “Center of Excellence.”
- Overhaul the current EFMP portal on Military OneSource to provide direct linkages to other federal, state, and local community programs and resources that may be of assistance to military families with special needs.
- Create a detailed EFMP “pathway” that enumerates and projects a “standardized” timeline and checklist and for “engagements with EFMP” across the lifecycle of a special need family’s career of military service (beginning with enrollment and Family Needs Assessment, and concluding with transition to the Medicaid Waiver Program in the family’s state of residence at the conclusion of service), leveraging the ability to pre-plan to establish expectations and ease family transitions.
- Publish and release the final standardized Family Member Travel Screening checklist grounded in the results of the recently completed pilot program.
- Develop and implement a standardized leadership brief to assist Family Support Staff in meeting with, educating, and messaging to military and civilian leaders and supervisors to secure their support for EFMP programs on their installations and in their units.
- Strengthen collaboration between EFMP and the Defense Health Agency/TRICARE to facilitate direct and timely engagement on, and resolution of, all EFMP medical care issues, ranging from those that are system-wide to those that affect individual families. Develop clear messaging to incentivize participation in EFMP based on the program’s ability to bring to bear unique resources and streamlined processes to resolve medical care issues related to special needs family members for those enrolled in the program.
- Evaluate and publicize the results of the Peer-to-Peer parent support pilot for expansion Department-wide with a view to providing more comprehensive support to those most likely to provide care to family members with special needs.

Deliberate Process Improvement: There are gaps in EFMP processes across the Department. OSN must first identify those gaps, assess the root cause, and then tailor a corrective action plan. OSN will:

- Complete a critical assessment of and map the current process and practice for the execution of each EFMP element (entry into EFMP, establishment of a Services Plan, assignment process, etc.). Develop and implement an overarching, integrated framework

for the concurrent execution of all program elements and standardize and align independent Service processes accordingly.

- Implement the EFMP family support customer service feedback tool to evaluate family satisfaction at key touchpoints such as Services Plan generation and PCS.

Appendix B

Samples of “The Exceptional Advocate,” a quarterly online newsletter published by OSN, follow next under.