



6-8-22

## Budget Authority Workgroup Notes

### Agenda

**Present:** Taylor McQuay, Stephanie Laird, Pat Carver, Jan Lampman, Angela Martin, Todd Koopmans, Tonya Lawrence, Melissa Fresh, Tedra Jackson-Washington, Courtney Trunk, Jill Gerrie



#### 1. Welcome and Happy Birthday Todd!

#### 2. Citizen Network: Good Practice in Personal Budgets, 2021

<https://citizen-network.org/library/good-practice-in-personal-budgets.html>

- Pat was looking for was information about how budgets are decided. There were no specific answers in this document.

Models of  
Good Practice  
in Personal  
Budgets



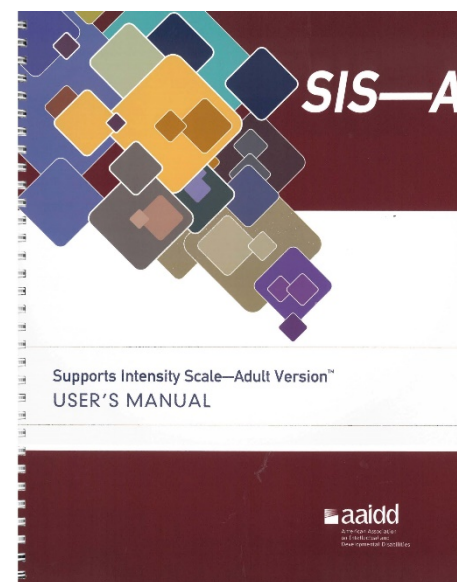
- We really haven't found the budget information we have looking for. It might not be out there, and we will have to create what we want.

- We talked about Wisconsin and their IRIS (Include, Respect, I Self-Direct) program. It has been pretty successful, but it is a program.
- We don't want a program in Michigan because we want everyone to be able to direct their services. Programs come with eligibility requirements.
- In the United Kingdom people work with a social worker to figure out what they need and then cost it out. They use actual costs, based on the going rates for an area.



- Laura told us that in Michigan the rate for services is supposed to be built on what traditional services cost.
- Once you get allocation how flexible is it? Can you buy things that make sense to you?

- Beginning 10-1-24 the Supports Intensity Scale (SIS) will determine whether you are eligible for the Habilitation Supports Waiver (sometimes called the HAB Waiver). It is not supposed to be used to determine services. The fear is that it is, or will be, used in that way. Jan will send the letter to everyone. Done.

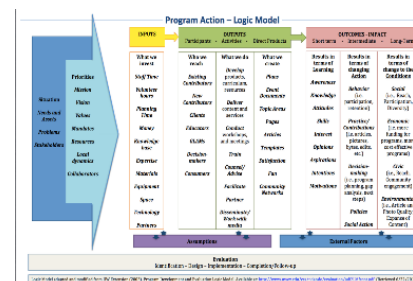


- Melissa talked about Ionia County where the rate for services is based on what was spent for the month – expenses divided by number of hours used. Ionia County says they are following the guidelines!

- Others give a set rate at the beginning and then calculate the budget. The Individual Plan of Service (IPOS) sets rate for employees and services.



- Todd reminded us that we should be asking ourselves what we want and that should drive what we recommend.
- Jan, Pat, and Jill (and anyone else interested, just let one of us know) will be putting together a logic model for Partners Advancing Self-Determination (PAS). It will help give us clarity. In a logic model you start with what you want and then figure out how to get there. We will have a draft in July for everyone to review.



### 3. MDHHS Update

- **National Center on Advancing Person-Centered Practices and Systems (NCAPPS)**



- Laura told us they had their first coaching call. Every participating state will set up meaningful change that is measurable. The coaches for the monthly meetings are folks from NCAPPS. NCAPPS guides the conversation.
  - NCAPPS recently hired someone with lived experience and is holding separate monthly meetings for folks with lived experience. NCAPPS wants to make sure people can give their input and are leading the way.

- The Michigan group is looking at self-directed services being the same across the state and getting true budget authority.
- In most other states self-directed services or self-determination is a program. Tedra notes that in the field it is operated or treated as a program – not everyone can participate. There is not much accountability. Interpretation of policy is different around the state.
- Laura was asked if she could please provide a written summary of her report each month. To have something in advance will help.
- S-D is not a program, it is a way of life. Stephanie
- Sheryl who is in the lived experience group, said there isn't enough time for all the different people to really get into the nuts and bolts of self-directed services. They only meet for an hour. More time is needed to talk about all that needs to be covered. Sheryl will ask if the time can be longer. These are monthly meetings. Time also needs to be expanded for the other group(s).



➤ **Meeting with Pre-paid Inpatient Health Plans (PIHPs),  
Community Mental Health Association of Michigan**

## (CMHAM) about the S-D Technical

**Requirements** - The next meeting is June 15<sup>th</sup>.

- An initial meeting was held setting ground rules (what can be discussed, etc.) Some people in the group don't seem to understand the purpose of the meetings.



- The PIHP/CMH people need to bring the language that shows what they claim does not match the contracts. They need to provide the information and the Department will respond.

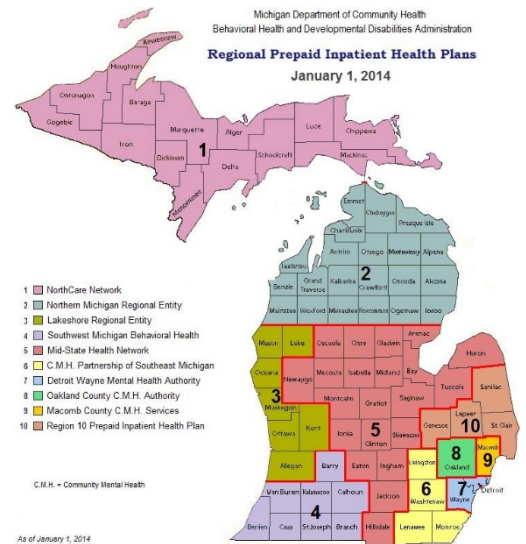


- The group was opened it up to other CMH folks. Folks joined who didn't say they would participate joined.

- Meetings have been scheduled for six months scheduled, but Laura wants to get it done before that.



- Next Meeting's topic: The role of Utilization and Management in the budget process and how to move money around in budget.
- A lawyer from CMHAM participates in traditional lawyer fashion. It will be interesting to see if she leads the charge. She is the contract negotiator.



- The PIHPs had initially decided they would follow the guidelines, then Joe Sedlock from PIHP Region 5 brought up issues.
- If there is anything that conflicts with the contracts the Department will add that information to the contracts. The lawyers want stuff deleted or clearly noted it is not a requirement.

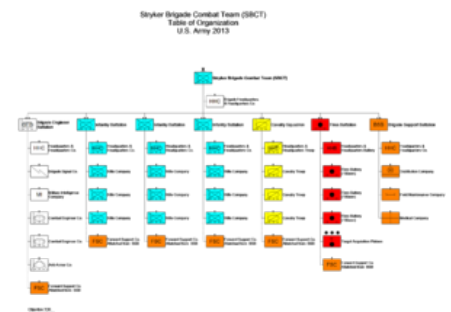
### ➤ Help Desk

- The number of questions has increased some. Laura, Marie, and Heather meet to review questions.
- It will be interesting to see if there is a big increase after the Self-Determination conference.
- Some CMHs are trying to figure things out on their own, which has resulted in some “oopsies”.



### ➤ Department Reorganization

- Laura's team got smaller.
- It appears the big push to work on diversity and inclusion put on hold with reorganization.
- The administration is so huge it is hard to know who to go to with questions.





- Children's services were split away from adult services, which is difficult.
- Big fun! Everyone just keeps moving along.
- The different departments have different self-directed services policies. Laura was trying to figure out how to identify who has what.



#### ➤ Other

- If Annette had not been here last time, how would we have known about the problem with PIHPs requiring six-month authorizations? How do we make the system do what they are supposed to do instead of making poor decisions based on a misinterpretation of recommendations? Suggestions included:



- ⚙ Build core of advocates in the state
- ⚙ Mentor others so we have enough advocates.
- ⚙ Interpretations of policy need to be given by the Department not the PIHPs/CMHs.
- ⚙ What if at the end of the monthly webinars do a myth and fact presentation (based on questions received)? PAS could use it in our presentations.



- ☼ Marie is adding a second webinar series specific to self-directed services to be done quarterly next fiscal year.
- ☼ During site reviews Marie and Heather can catch some problems with self-directed services.

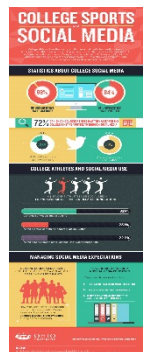
#### 4. Follow-Up on Six Month Reviews and Authorizations

- Laura talked to auditors about this and is trying to figure out why people are misinterpreting the recommendation to have six-month reviews.
- We are hoping Annette was able to resolve issue in Detroit (and Oakland?).



#### 5. Follow-Up Survey?

- We want to go back to folks and thank them for their responses.
- Should we go back and do another, a one-pager? Is it time to do it? Sharing advisory group availability? Give a summary? The answer to these questions was yes.
- Angela will put together a plain language infographic and put it out for comments.
- We decided to put the infographic on the web page with a link for full results.





- We decided it would be okay to paraphrase answers on the infographic, but use actual statements in the complete analysis.

## 6. Research?

- Our next step will be to develop a logic model for the PAS project.



## 7. S-D Table

- Jill will be sending an updated table soon for everyone to review and provide suggestions.

[illegible]

## 8. Other

- **Come to the S-D Conference! Click below for more information.**

[Event Details • CMHAM - Community Mental Health Association of Michigan](#)

## 9. Future Meeting Schedule – 10:30 a.m. - noon

- ☀ 07/13/22
- ☀ 08/10/22
- ☀ 09/14/22
- ☀ 10/12/22
- ☀ 11/09/22
- ☀ 12/14/22

