

10-12-22

## Budget Authority Workgroup Agenda

### 1. Welcome – Jan

Angela Martin, Jan Lampman, Courtney Trunk, Todd Koopmans, Tedra Jackson, Heather Hallett, Stephanie Laird, Laura Demeuse, Tonya Lawrence, Jill Gerrie



### 2. What Budget Authority Should Look Like – S.C.A.M.P.E.R. – a brainstorming technique



**Substitute** (any parts for more affordable or effective alternatives?)

- Professionals for peers (people with lived experience) in Information & Assistance for example, have peers more involved in the meetings (add)
- Unit rates for total cost of services – get rid of the 15-minute increments
- Substitute Supports Coordinators for people without a financial stake in what you get for services – without conflict
- Current education to robust, good education
- Utilization Management for something different



- **Combine** things? Mix things together to create something new?
- Combine all of the money to be used in a more flexible way -get rid of the 15-minute increments



- Billing codes
- Combined process to make changes and adjustments to budget and services – needs to be similar, can't be different steps, make it less complicated

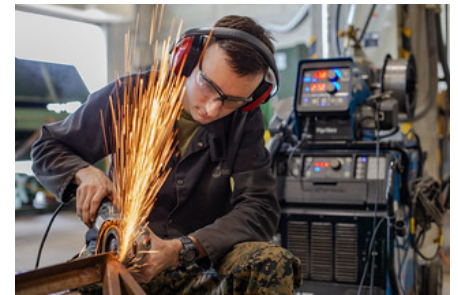
**Adapt** – transform product?

- System advocacy – people still think S-D is not for everyone – as more agencies are going to contracts there's a lack of education regarding S-D being for everyone
  - Adapting the information coming from the Department – clear messaging regarding S-D for everyone
- DEI (Diversity, Equity, Inclusion) – combine with above to push



**Modify** - Change it? Put to another use? Reach a wider audience? Useful somewhere else?

- Training needs modification and standardization, with core competencies – so no matter where you live Supports Coordinators, Direct Care Workers meet the same competencies
- Don't make it difficult to become a worker by requiring so much training
- Equal respect for workers employed by agencies and those hired directly
- Raise pay & benefits
- Make it easier to attract workers and independent Supports Coordinators (frozen salaries, etc.)
- Built in increase in wages (in CMH/PIHP contracts) could be directed by the Department, also include employee



- related expenses (for example Electronic Visit Verification and cell phones), especially for directly employed people
- SD Coordinators do more education with people before and during S-D
  - Brokers who can come in and help with S-D
  - Clarifying roles
  - The way budgets are done – make a basic list of extra add ons, like paid time off and other things that can be added into the budget to make it easier to do and understand
  - Make budgets easier to understand, from the reports received to the process
  - True Self-Direction wouldn't be tied to units = would be a whole budget, so if I chose to give someone a raise, I could do that by looking at my whole budget
  - Rules around what you can do with a budget (therapeutic horse riding, other community-based options, etc.)  
Modify or clarify language, simplify rules to show you can use budgets for these things
  - Training/reference book for folks directing their services in plain language version of technical requirements – not long
  - Arc Handbook, put link in
  - Circle of Supports information – how you can pick the people you would like around you
  - Modify the waiver language and then...
  - Modify messaging from the Department

### **Put to Another Use or Expand**

- What if people doing traditional process participate in the development of their budget?



Expand understanding of budget beyond S-D to those receiving traditional funding. People can then think about

whether or not they are getting the life their budget is paying for.

- Make traditional services budgets as transparent as those you get with self-directed services
- Person-Centered Planning - expand so it's actually happening
- Get everyone understanding everything, get everyone on the same page with regard to understanding self-directed services.
- Utilization and Management (UM) could be used to make sure people get enough services instead of checking to see if they get too many.
- No wrong door – no age limitations, etc. to receiving self-directed services
- Utilization Management could be used to be back-up staff for people
- Change the name of Utilization and Management – because of the mindset that comes with it.
- People in Utilization and Management don't know the people for whom they are making decisions. It's all paperwork driven – (problems with that poor writing, assessments, etc.) Must meet the people for whom they are making decisions about their services!

**Eliminate** – get rid of something

- Bad attitudes
- Diagnosis doesn't dictate services, eliminate the false connection between diagnosis and services.
- Start with what is needed – not the rate systems
- Tiered system Utilization and Management uses is unfair – not person-centered. Each person should be determined separately.



- Get money out of the process of getting services, at the beginning at least. More focus on things needed and then talk about the cost.
- Stop micromanaging budgets, people can't anticipate everything they will need.
- Shouldn't have to get approval of changes & and requirement of 6-month budgets.
- Units! A unit driven life is not realistic!

**Reverse** what would happen if you did the exact opposite – did in reverse sequence

- CMHs understand that budgets are plans and must be flexible and that under/overspending per month is natural.
- Utilization and Management decisions should go back to the person for their approval. No signature on plan until satisfied and final with budget included. People are signing plans without the budget. People are supposed to sign their budgets according to Laura, but that isn't happening.
- People who are not getting the budget they agreed to are told to go to appeal if they are not satisfied or happy. That is not what this is about. Appeals threatening – if you don't sign this... what about an outside/independent opinion?
- Don't use appeals to fix budgets!
- Messaging regarding signatures for plans and signatures for budgets needs work.
- Eliminate monthly budgets that eliminate money based on utilization monthly not yearly.
- Don't look at utilization monthly, but yearly.
- Losing units (hours) based on the lack of staff – stop it! The system needs to ask why hours or units weren't used.



The system never adds back the in-kind support provided due to lack of staff.

- In the state site review process, first focus on quality of life, not compliance.



Thank you Tedra for SCAMPER!

### 3. Update on Ottawa Community Mental Health – will be holding the second meeting this month.



- We will be holding our second meeting soon.
- Laura is frustrated because Ottawa is stuck on figuring out budgets instead of using the person-centered process.

### 4. MDHHS Update – Laura sent in advance



- Some CMHs are still saying the Guidelines are just Guidelines and they don't need to follow them if they don't want to. Is there a way to make email public? Probably not. Tedra said that if you read the response from the CMHA group carefully you will see that they didn't exactly say they would follow the Guidelines. She suggested others read the email again.

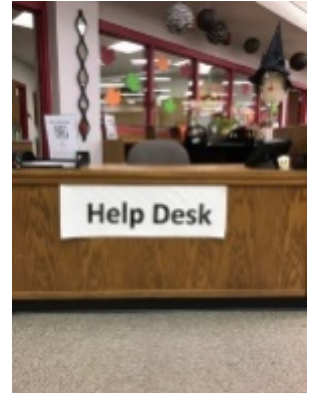
Laura said that one of the things they (CMHA and all) complained about were the “musts” and the “shalls” when it came to doing things. She and Marie researched them all and tied them all back to regulation and laws, so they had nowhere to go.

- Tedra asked how the questions from the help desk are going to be considered for the content of next year's S-D conference? Heather keeps a running list of issues, plus evaluations provided are used as well as feedback.

- County of Financial Responsibility problems – Sheryl S. is working with someone who was a Macomb County resident that was surrendered in Wayne County. They are fighting... Laura suggested she contact customer service folks at the Department.

### 5. Help Desk Update – Heather sent in advance

- Is there a way for this group to be helpful with the FAQs? We could be sending out myth busters to help spread the information.
- Laura mentioned wage and hour issues as an example.



### 6. S-D Table - Jill

- Jill will talk to Stephanie about the formatting of the table to make it more accessible.

### 7. Other

### 8. Future Meeting Schedule – 10:30 a.m. – noon – Jill will send Doodle Poll with options of days of the week.

- ⚙ **11/09/22**
- ⚙ **12/14/22**

