

1-12-22

Budget Authority Workgroup

10:30 a.m. - noon

Join Zoom Meeting

<https://us02web.zoom.us/j/83351024353>



Agenda

Present: Marie Eagle, Angela Martin, Pat Carver, Jan Lampman, Courtney Trunk, Melissa Frash, Tonya Lawrence, Tedra Jackson-Washington, Sheryl Kuenzer, Laura Demeuse, Annette Downey, Jill Gerrie



1. **Welcome** and what we each were looking forward to in the new year - Jan
2. **Letter from MDHHS** (Al Jansen) – Tedra – Al Jansen’s not totally back to work yet, and Tedra really hasn’t had time to address this.
 - We will be meeting with Michigan Department of Health and Human Services (MDHHS) in the beginning of February.
 - Tedra had a conversation with Jill and asked if maybe we shouldn’t include Community Mental Health Association of Michigan (CMHA) in our group, somewhat jokingly. But given the difficulty we’ve had with the updated self-directed services (S-D) policy, maybe we should Include some Community Mental Health (CMH) folks from leadership and finance?
 - It was suggested maybe we include Shirkey and Whiteford given their introduced legislation.



- Talked about the problems implementing the updated S-D policy. Identifying barriers is within the scope of this workgroup.
- Quality seems to be Belinda's focus currently... fixing budget authority would be within that focus.
- The conflict free workgroup will be beginning again soon.
- One of the barriers to true budget authority is Michigan Department of Health and Human Services not enforcing their policies.
- What steps within the Department need to be taken to ensure revisions are followed and enforced? Need to use clear language that doesn't allow multiple interpretations.
- The Partners Advancing Self-Determination (PAS) project (Angela and Jill), the Developmental Disabilities Council (Tedra, Vendella, and sometimes Yasmina) and MDHHS (Laura, Belinda, Lyndia) meet quarterly. The next meeting is in the beginning of February. For that meeting perhaps we should ask MDHHS to affirm what we're doing and ask if it is okay to share with ACMH, others. It will be even more important with budget authority to have their support.
- It was suggested we could put a project announcement out on Arc Michigan's and the Council's websites, so everyone knows what we are doing. We want to head off what happened with the

updated S-D policy and avoid similar problems. We don't want exploding heads over what we propose... it is about control over money after all!

- This group needs to focus on the values and principles of self-determination.
- Discussed Detroit Wayne Integrated Health Network (DWIHN) pulling all services back and canceling contracts with providers (i.e., Community Living Services) and all the problems that could occur as a result. Yikes!
- Angela suggested we look at financial management services organization (FMS, also known as Fiscal Intermediaries) utilization from this point forward. We did this in the past in Michigan Partners for Freedom.

3. Finding People with Disabilities to Join – All

- Kudos to Melissa for finding folks interested in joining our group! 10 parents interested!
- Jan knows a person who would be interested who might be a potential member (Tayler/Katie).
- Jill talked with a parent of a young man who could start in February.
- Annette will ask Sheryl & Stephanie.
- Pat talked to Nick Gage, the attorney in the lawsuit in Washtenaw County, about joining the group. He just



began employment with Michigan Disability Rights (formerly Michigan Protection and Advocacy). Because they are involved in a lawsuit with MDHHS, it could be considered a conflict of interest for him to join. Pat will keep him updated on our work. He might be someone to contact if anyone is considering a lawsuit over services.

4. Values Statement to Guide Discussion - Pat



- Self-directed services must include an individual service budget. The individual budget provides a set amount of funds necessary to implement the individual's IPOS. An individual may choose to direct one specific service, some, or all services in their IPOS. The level of control will be determined by the individual. (Needs correct attribution – Jill will ask Laura)
- We also have the following to support our work:
 - Principles of S-D
 - Mental Health Code
 - Waiver language

5. Assignment Updates - All

Annette – In Wisconsin they provide S-D services three different ways: family care (like CMH), children, IRIS model, which began in 2008. Their services include:



- full budget authority
- assessment done – similar people receive similar budgets
- the entire service array is directed
- includes multiple populations

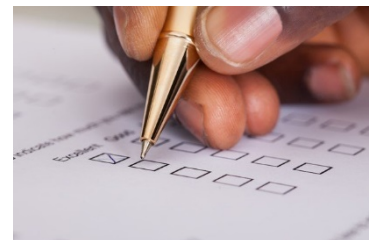
- They have 22-24,000 folks using S-D via IRIS.
- Another 10,000 who have traditional services self-direct
- Allows more flexibility, allows family members to be paid, including guardians. Especially important during direct care crisis.
- IRIS consultants in compliance with conflict-free regulations. They also fund an advocacy network.
- Financial Management Services agencies (also known as fiscal intermediaries) – they have four statewide, including GT Independence
- Annette sent information to Jan who forwarded it to us all.



Pat - New Zealand will be discussed next meeting.

Angela drafted some questions for a survey we will send to people using S-D services.

- She has 10 questions now and would like this group's help to focus on what we want to know. The survey should probably be five questions, and no more than seven.
- She made a checklist for the questions to make them easier to answer.
- A couple of questions on demographics are included so we can tell if issues identified are regional or state.
- Angela will review draft will Pat and send questions to us. When done we'll post to our websites and send the survey to our networks. Laura can send them to the S-D coordinators who can forward them on.



- How long should we keep the survey open? It was decided to leave it open for a couple of weeks.

Marie – Has thought a lot about what we want the Department to include in their letter for us, basically everything we talked about at the beginning of the meeting. Is sick with Covid!

- California has self-directed services in law. In 2013 pilots began, but they are not even serving 1,000 people.
 - Has been bureaucratized. Very administratively heavy, with lots of barriers. To get budget approved, people have to go through many layers.
 - S-D is not going well in general. We could learn a lot about what not to do.
 - It all sounds good on paper but is not implemented as intended. Lots of money goes to administration, for example, one of the first thing they did was hire 900 people to be what seems to be the equivalent of S-D Coordinators.



Melissa looked at Minnesota. They have four options and budget are determined by assessments. Annette has some resources that she will get to Melissa who will look at Minnesota some more.



Jill did England and learned they also have four options for self-directed services. She will send a chart to Pat that explains it all.

- One thing they do is combine all money from all agencies into the personal budget, which would be great to do here. More to come.



6. More Research – All

- North Carolina - What's going on there? Jan will check them out. GT Independence has offices there and Tonya has a contact she will get to Jan.
- New Mexico – Pat will check out. Rebecca Schuman, former director of the Arc of Midland, would be a good resource. Jan will get Pat her contact information.



7. National Center on Advancing Person-Centered Practices and Systems Application for Self-Direction Learning Collaborative

<https://ncapps.acl.gov/learning> – Angela

- The application is due very quickly and Laura says Michigan is going to apply. Angela offered to help with the application. It asks for your team members which must include four to eight people with lived experience. Angela pointed out that Laura has Sheryl, Jan, and Angela until we get others. The project runs from April 2022- Sept 2023 and has monthly coaching calls. The first one is held at the Applied Self-Direction's annual conference this spring.



8. Survey for S-D Coordinators – Laura will hold for next meeting.



9. Assignments

- Tedra – Letter from MDHHS
- Annette will get Melissa resources for Minnesota and ask Stephanie and Sheryl Stambaugh to join our group.
- Melissa will finish exploring Minnesota's self-directed services.



- Pat – New Zealand and New Mexico – Pat will also put a chart together of all the information we collect about self-directed services in other states and countries.
- Angela will reduce the number of survey questions with Pat and send them to everyone for review. They will then be finalized.
- Jan will get Rebecca’s contact information to Pat and talk to Tayler about joining the group.
- Courtney will put together a draft announcement about PAS and our work on budget authority. Jill will help.
- Laura will talk about her S-D Coordinators survey at the next meeting with the hopes of some coordination with the survey of people using services.
- Jill will finish up England, work with Courtney on the project announcement, and once again ask Laura for the correct name of the S-D policy and requirements. She will look into including folks from Community Mental Health on our group, after the meeting with MDHHS.



Future Meeting Schedule

- 01/12/22
- 02/09/22 – Sheryl will be late
- 03/09/22
- 04/13/22
- 05/11/22
- 06/08/22
- 07/13/22
- 08/10/22
- 09/14/22
- 10/12/22
- 11/09/22
- 12/14/22

