



5-11-22

## Budget Authority Workgroup

### Agenda

10:30 AM

**Present:** Sheryl Kuenzer, Tayler McQuay, Jan Lampman, Angela Martin, Stephanie Laird, Heather Hallett, Annette Downey, Sheryl Stumbaugh, Tonya Lawrence, Courtney Trunk, Tedra Jackson-Washington, Laura Demeuse, Jill Gerrie



**1. Welcome** – Jan asked everyone to name their favorite spring thing during introductions.

**2. Survey Update** – Angela did some more analysis of the responses to the survey we did earlier in the year. It closed on 3/1/22.

- 260 family members
- 110 were professionals
- 335 people total responded
- We shared the survey on multiple websites, monthly training, etc.
- Other in professionals included: Assistive Technology staff, Community Living Support staff, Self-Determination Coordinators, Financial Management Services or Fiscal Intermediaries, Peer Mentors, Clinical staff



- Which arrangements: most people (people with disabilities and family members) selected direct hire.

- Challenges – finding services to use budget, negotiating rates & using budget to buy services wanted.



- Want to buy things or services that reflect their life and buy supports in the community.

- Themes really fell into four buckets – knowledge, experience, operational issues, and system issues.

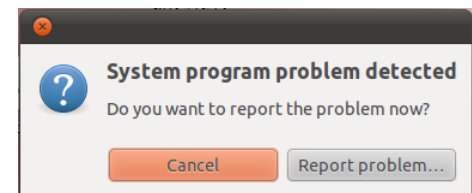


- Angela shared direct quotes from the surveys regarding challenges in the four theme areas.



- Next quotes regarding what people would like to do with their budget in the four theme areas.

- Basing a budget on medical necessity was mentioned as an issue that we need to address.



- Key quotes that summarized what people said: (get from survey results)

- A lot of people didn't know who their PIHP was, and some didn't their CMH.

- Not enough response from Wayne and Macomb Counties based in population.

- Financial Management Service – the Arc was noted the most, most likely because there was a large response from Oakland County.
- We can follow up with additional questions with 160 people!



### Comments:

- In most counties moving money between line items without prior approval is not done without an amendment to the plan, even though it's in policy and the waiver.
- An Allocation Model gives people with similar situations the same amount of money. This would need an evaluation or assessment that is used by everyone.
- Budgets annually provide more control and flexibility = went to every 6 months with periodic reviews
- MDHHS told one area that an Individual Plan of Service periodic review needs to be done every six months. The PIHP decided it meant authorizations also need to be done every six months. This will be added to our list of items to talk about with MDHHS. Wayne County just got a citation in addition to Oakland and Macomb Counties. Per Laura, a periodic review should not have anything to do with length of budget authorization. Yay! The state needs to clarify this with PIHPs. Annette will address in Wayne County.
- Utilization and Management locks out authorizations for more than 6 months



### 3. Citizen Network: Good Practice in Personal Budgets, 2021 - Jan

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

Models of Good Practice in Personal Budgets



- People wanted more time.
- We extended the deadline until next meeting.
- Maybe pair up with others? Let us know. Groups so far: Sheryl S. and Sheryl K., Jan & Tayler, Angela & Stephanie

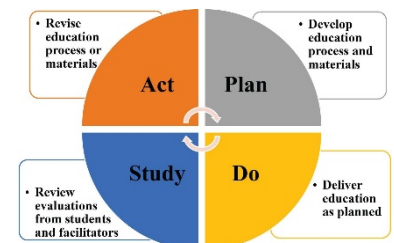
### 4. MDHHS Updates – Laura

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



- The first orientation is done.

- This is a learning collaborative with quality improvement. Sometimes called a “plan, do, study, act” model.



- First the group figures out their aim/purpose.
- Systems change is the goal.
- People with lived experience have their own meeting coming up later in May. Same for family members. Person from Applied Self-Direction will be facilitating for those with lived experience.



- During the first orientation Michigan was grouped with Alabama & New Jersey. It was interesting to see where other states are. Alabama still has institutions, etc.
- Many other states do self-direction as a program with eligibility criteria etc.
- If we come up with good ideas perhaps the NCAPPS group could try them out.



- Roles of folks in the NCAPPS team: Laura's the team leader, people with lived experience are advisors, reporting specialists are Tiffany Lang (from our group) and Heather Hill from MiChoice, and implementation specialists Teresa Tokarczyk from AuSable Community Mental Health (is also on this group but hasn't been able to attend) and Marie Eagle (from our group).



- Just starting and will have monthly coaching meetings with NCAPPS and two large group meetings per year.

- **S-D Help Desk**

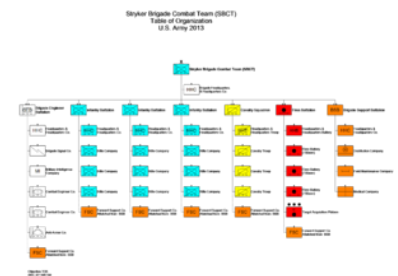
- Haven't gotten blasted with questions.
- Heather is putting Frequently Asked Questions (FAQ) template together. There then will be a site on the internet for the FAQs that will answer questions frequently asked – duh!



- We need to let folks know it's available.
- The site is available for anyone and is: <https://arcmi.org/projects/pcpqj/>
- The hope is that the Help Desk would be the starting point for issues and then requests for assistance would be for anything not included.
- It was pointed out that technical assistance should be included as Help Desk support.

- **Department Reorganization**

- It is slow going.
- Communication between and within departments is still an issue.
- Lots left to do.



**5. S-D Table – Please provide Jill with feedback.**

Database Name	Implementation Date	Project Director	Project Manager	Project Lead	Project Sponsor	Project Stakeholder	Project Status	Project Risk	Project Impact	Project Value
Comptech (search engine)										
ARL/Carlisle										
ARL Digital Library										
Business Cycle Indicators										
Business Security Provider										
CAR Abstracts										
CAR Enhanced Fax Research Database										
Carroll / Business Association										

**6. Research – read the Good Practice thingy for next time.**



**7. Other**

- **Logic Model?** Starts with outcomes and then steps to get there – to-do – Jill, Pat & Jan get together



- <https://citizen-network.org/uploads/attachment/804/good-practice-in-personal-budgets.pdf>
- **Group getting together soon** to resolve issues brought up by some Community Mental Health agencies and PIHPs about what they see as contractual differences with the self-directed services policy. Discussion will be about using the provider rate to determine the cost of services and provider training.



## 8. To Do

- Address with the state: MDHHS told one area that an Individual Plan of Service periodic review needs to be done every six months. The PIHP decided it meant authorizations also need to be done every six months.

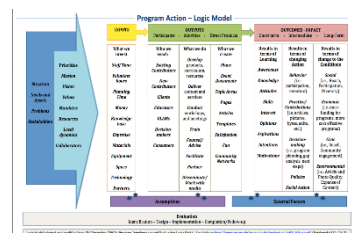
Models of Good Practice in Personal Budgets



- Please read **Citizen Network: Good Practice in Personal Budgets, 2021** <https://citizen-network.org/uploads/attachment/804/good-practice-in-personal-budgets.pdf> We will discuss at our next meeting.

- People decided to get together to review it together.

- Jill, Jan, and Pat get together to do a logic model for Partners Advancing Self-Determination.



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

- ☀ 06/08/22
- ☀ 07/13/22
- ☀ 08/10/22
- ☀ 09/14/22
- ☀ 10/12/22
- ☀ 11/09/22



☀ 12/14/22