



HCBS STRATEGIES, INC.

Improving Home and Community Based Systems

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April Stakeholder Meeting

4.17.2014		In-person
Note taker	Andrew Cieslinski	
Attendees	Katey Castilla, Dyann Walt, Barb Wilkins-Crowder, Tim Cortez, David Bolin, Gary Montrose, Ben Spangenberg, Brittney Trujillo, Cordelia Rosenberg, Carrie Schillinger, Jose Torres-Vega, Julie Reiskin, Suzanne Brennan,	
Overview		
<ul style="list-style-type: none"> • HCBS Strategies presented a summary of the operations review and addressed stakeholder feedback and comments. • HCBS Strategies discussed potential purposes that assessment tools could serve and provided preliminary recommendations for Colorado. Stakeholders provided feedback on these recommendations and several of the recommendations were altered. • Information already summarized in the presentation is not repeated in the notes. The notes primarily capture stakeholders' feedback and input. 		
Operational Review		
<ul style="list-style-type: none"> • HCBS Strategies completed an operational review of the CO system for accessing services. This included entry points, programs, eligibility criteria, assessment processes and support planning functions. • HCBS Strategies collected and catalogued the assessment tools used by CO. CO staff were interviewed to help identify the purpose and scope of the tools. Although the ULTC 100.2 is a common assessment tool, the state uses between 25 and 30 tools in addition to the ULTC 100.2 for purposes of support plan development information and resource allocation. • Stakeholders generally agreed with the findings in the operational review. They also highlighted several systems reforms initiatives that were occurring, notably changes to the single entry point structure and separating the eligibility determination process from ongoing case management. 		
Purposes of the Tool Discussion Overview		
<ul style="list-style-type: none"> • In designing a new tool, HCBS Strategies and state staff have discussed the need for the new tool to provide the necessary information used for eligibility, triaging access, support plan development, quality management, and resource allocation. While the new tool will look longer than the ULTC 100.2, it is necessary to view it in the context of all the current additional tools used. • Stakeholders said that the tool should support the choice of different programs rather than the access process to programs dictating the choice. 		
Using the Tool to Support Systems Change		
<ul style="list-style-type: none"> • The stakeholders endorsed using the assessment process to support systems change. • They endorsed the draft recommendations that the tool should be used to support furthering a person-centered system, enhance self-direction, and facilitate greater coordination of services. • A stakeholder recommended adding fostering employment as an additional recommendation. Other stakeholders strongly endorsed this and State staff concurred. Therefore, this will be added to the list of requirements. • Another stakeholder recommended supporting the transition from services supporting children to services for adults. While this is an important area, because the current plans do not include assessing children, it may be difficult to achieve. However, HCBS Strategies staff will keep this recommendation in mind and give further thought to how it can be achieved. • There was concern that the latest definition and information around impairment would not be used. Steve Lutzky said that these tools would incorporate the most recent definitions, but feedback from stakeholders would be welcome. • Tool and system should minimize fragmentation of the data • Another point of input was that the tool should play a role in improving the quality of services and supports, especially from the perspective of the individual. SEP perspective is that using the current surveys is an ineffective way to obtain quality data from clients because it is too far removed from assessment and discussion of services. If incorporated into the assessment, it would potentially be an effective strategy for obtaining quality and experience information. <ul style="list-style-type: none"> ◦ Steve Lutzky said that IL has an interRAI based consumer experience survey that is used to monitor performance of care coordinators and service providers based on consumer feedback. 		
Using the Tool to Support Eligibility Determinations		
<ul style="list-style-type: none"> • The stakeholders understood that the current effort to develop a new tool will focus on adults with disabilities and not include children. However, it was emphasized that there is the need to expand the tool for children in the future. Therefore, selecting a tool that could be adapted for children should be a consideration. 		

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<p>Using the Tool Triage Access</p> <ul style="list-style-type: none"> The stakeholders agreed that an intake module should be developed that could be used by the SEPs and CCBs. The stakeholders also recommended exploring whether and how the ADRCs could use the intake module. HCBS Strategies will consider this in the design phase. 		
<p>Using the Tool to Support Resource Allocation</p> <ul style="list-style-type: none"> The stakeholders strongly agreed that the tool should support refining and expanding the use of a resource allocation approach so that the State could expand service definitions and provide more flexibility without concern about the overall impact on the budget. Julie Reiskin said that if any tool is adapted, it should be used as it was designed and not be taken in a completely different direction. The current CO SIS tool is not used as designed. CO only took portions of the SIS tool to create the resource allocation methodology. Stakeholders expressed dislike of the time for task approach. It does not work well in community settings/homes and is objectionable to individuals going through assessment. Group gave positive feedback about an approach that would establish a cap on an allocation but would allow individuals greater flexibility to determine the service that would best fit individual needs and preferences. Individuals whose needs could not be met within the cap system could be handled through an exception process. 		
<p>Using the Guide the Development of the Support Plan</p> <ul style="list-style-type: none"> The stakeholder endorsed the draft recommendations. Jose Torres-Vega recommended that the support plan should be a flexible document so that individuals who do not need detailed plans because they can develop and direct their own services have a more abbreviated version than someone relying on a case manager to generate the plan. Steve Lutzky discussed that the development of the support plan is not part of the current scope, however, HCBS Strategies will be making recommendations on this and will include Jose's recommendation. 		
<p>Using the Tool to Enhance Quality Management</p> <ul style="list-style-type: none"> The stakeholders endorsed the draft recommendation that the tool should support quality management initiatives. The stakeholders wanted to strengthen the recommendation that participant experience measures be explored. Specifically, they wanted to expand the participant experience concept to also include quality of life and have the recommendation be that this be included as a tool purpose (rather than simply explored). Gary Montrose recommended that these measures include both quantitative and qualitative measures. He is working on an initiative related to this and will share that work with HCBS Strategies. The stakeholders stated that they want to see external stakeholders and State collaborating on what information is collected and how it is collected. While the assessment process may be one opportunity to collect information, other independent sources should also be considered. 		
<p>Additional Discussion</p> <ul style="list-style-type: none"> One of the stakeholders recommended using this opportunity to refine eligibility criteria. Steve Lutzky stated that developing new eligibility criteria is not within the current project scope. He emphasized that changing eligibility criteria will result in winners and losers and selecting new criteria and a transition plan to the new criteria should be given careful consideration and opportunities for stakeholder input. Mesa County has a fully operational ADRC and welcomed HCBS Strategies to visit and view their operations. <ul style="list-style-type: none"> Tim Cortez said that they would most likely talk via web-enabled call during May. The stakeholders agreed that a two week deadline (May 1) for feedback from other stakeholders was reasonable. They will contact Andrew Cieslinski with information. <ul style="list-style-type: none"> This will be posted onto the blog for individuals not at the meeting. Tim Cortez mentioned that as part of the federal TEFT grant received by CO, there is an interest in having states look at using an expanded CARE tool. Steve Lutzky highlighted the purpose of the next meeting. Please see the blog for further information on this. 		
<p>Overall Action Items</p>		
Action Items	Person Responsible	Deadline
Send the ADRC Screen and any other ADRC Documents to HCBS Strategies	Tim Cortez	completed