HCBS STRATEGIES, INC.
Improving Home and Community Based Systems
www.hcbs.info 410-366-HCBS (4227)
info@hcbs.info

Stakeholder Meeting 1: Discussion of Employment, Self-direction, and Person-centered Modules

1.27.14		In-person
Note taker	Andrew Cieslinski	
Attendees	Tim Cortez, Brittani Trujillo, Kelly Wilson, Chandra Matthews, Donna Zwierzynski, Charlene Willey, Carrie Schllinger, Erin Fisher, Dyann Walt, Robin Bolduc, Carol Merideth, Grace Herbison, Cassandra Keller, Michelle Robinson, Gretchen Himmer, Steve Hemelstrand, Dyann Walt, Gary Montrose, Pat Cook, George O'Brian, Candie Dalton, Sarah Avrin, Aileen McGinley	

Overview

- Information already summarized in the presentation is not repeated in the notes. The notes primarily capture stakeholders' feedback and input.
- HCBS Strategies developed a summary document of the three planned pilots (Level of Care Validation Study, Person Centered Pilot, and Intake and Eligibility Pilot) that will occur as part of the Assessment Tool Redesign effort. Steve Lutzky gave an overview of this document and summarized the pilots.
  - The Level of Care Pilot was pushed back in the work plan because the federal contractor assisting with the development of the CARE tool may be changing some items that will be incorporated into the Colorado Assessment tool.
- HCBS Strategies presented proposed approaches for the employment and self-direction modules to obtain feedback from stakeholders prior to creating draft modules.
- HCBS Strategies presented the draft version of the person-centered module that was based on the proposed approach and stakeholder feedback from the December meeting.

Employment, Volunteer, and Training Module Approach Discussion

- The Employment, Volunteer, and Training module is being developed to fit as a module within the broader Assessment.
- The purposes of this module include:
  - Learning about and discussing participant interest in employment, volunteer, and/or training opportunities.
  - Identify skills or strengths.
  - Identify barriers (perceived or real).
  - Identify and link the participant to resource needs for supporting interest in employment, volunteering, and/or training.
- The tool will not be assessing the individual's employment performance skills/abilities, but rather will be designed to gauge interest in employment, volunteer, and/or training opportunities and will identify individual strengths and perceived barriers.
  - This philosophy is consistent with the national promising practices.
  - Best practice suggests that the assessment of the employment abilities and support needs should be tailored to employment (or volunteer or education) opportunity.
- Donna Zwierzynski had a question about how knowledgeable the SEPs will be about employment supports and opportunities. Chandra Matthews responded that it will be dependent on the individual employee and the quality of the training that is developed, but SEPs should be linking participants to employment and training resources.
  - Shirley York said that the concern about case manager familiarity with resources have also been discussed with the Department during the development of the draft tool, and will continue to be addressed with training and other efforts to create better linkages.
  - Tim Cortez said that the Department is committed to providing appropriate training, to which Chandra said that the training will need to be consistent across all agencies and be kept up to date.
- There are many definitions of employment used by states, but the tool will be using Colorado's definition. The national definition includes ensuring the opportunity is an integrated setting and the employee is making at least minimum wage, including work that is performed under customized employment. *Jose Torres-Vega said to look at the current definition that is used for Medicaid buy-in for a good definition pertaining to Colorado.*
  - Jose said that the current system doesn't allow individuals to be employed with "significant gainful employment", which is a major barrier to exploring all opportunities. Julie Farrar said that a variety of employment, volunteering and training options need to be available at/above minimum wage.
- There was a discussion about the incorporation of sheltered workshops within this module. It was reported that sheltered workshops are no longer covered under Medicaid, and stakeholders felt that it would not be beneficial to use the employment module to foster sheltered workshops.
- Pat Cook said that she wants to ensure that cultural practice is an important consideration for all modules, including employment. Steve Lutzky responded that cultural practices will be built in as part of the person-centered component. Shirley York said that this could likely be incorporated directly in the employment module in some way, perhaps in the area around an individual's perceived barriers or strengths.

- Jose Torres-Vega said that it is ingrained in people with disabilities that they cannot work because they don't want to lose benefits, and it will be important for case managers to talk with individuals about income and benefit limits.
- Chandra Matthews said that she wanted to ensure that it was known that SEPs/CCBs won't actually be placing individuals in employment, but rather providing information and referral. She said that she agrees that training, staff ability to answer questions, and ability to provide some benefits counseling will be crucial.
- Steve Lutzky said that the Support Plan will be an important tool for developing action steps that can help an individual meet their goals, both in terms of employment and otherwise.
- Employment, volunteering, and training needs and desires will vary across age groups, as this tool will cover individuals ages 18 and older. HCBS Strategies proposed to tailor the items towards three groups. While the items would be similar or the same, the emphasis might vary based on the age and interest of the participant.
  - One section would be tailored for those individuals 18-60 and would have a primary focus on employment interest, options, and satisfaction of current job, if applicable.
  - Another section would be designed for young adults who have not yet transitioned from high school. The emphasis for this group will be on post-secondary training/ education and employment interests.
  - The third section would emphasize the interests of individuals ages 60+. The focus for this group might more frequently be on continuing education and volunteering unless the participant wants to be/remain employed.
    - Pat Cook said that she would like to get rid of this third group because many people ages 60+ are still looking for employment opportunities. Shirley York said that the intent was not to exclude employment opportunities for those ages 60+, but allow for the focus to be more on retirement and post-retirement planning and activities.
    - Tim Cortez said that he thought that the 18-21 transition should stay, which Pat Cook agreed with. David Bolin said that individuals who don't have an intellectual disability but some other disability seem to be excluded by schools in executing transition planning, and there should be opportunities and options counseling for these individuals as well.
    - The decision was made to merge the first and third groups, and keep unique items for the transition group.
- The March stakeholder meeting will include a presentation and discussion of specific items.

Self-direction Module Discussion

- The Self-direction module will also be housed as a module within the larger Assessment, and the proposed purposes of this module include:
  - Ensuring that all participants can make an informed choice about self-direction
  - Allow for an evaluation of whether individuals have the capacity to self-direct alone or will need more assistance
- The group went through a brief review of the updated self-direction module from MnCHOICES, which can be found on the blog, and a previous iteration of the same module that the group felt was too long. Tim Cortez said that to shorten the assessment, after the assessment meeting, staff could leave information about options and what it would take for the individual to self-direct, and case managers could follow-up later.
  - Steve Lutzky suggested that providing additional information and making the decision to self-direct might be better placed in the Support Plan development. This was supported by the group as a way to give participants time to review and consider information and to ensure follow-up as part of the Plan development.
  - The individual will play a lead role in the process, and the Department will need to discuss more about what types of information and other assistance are needed for the participant to be comfortable in taking a lead in performing duties associated with directing and managing staff and services. It may make sense to begin this conversation at the onset of the contact with the individual so that he/she has time to think about options and how much he/she wants to direct services.
  - Julie Farrar suggested that there should be a variety of ways to learn about self-direction, including being able to talk with a person who has performed these duties.

Draft Person-centered Module Review

- This discussion focused on the items in the draft paper version of the Person-centered Module, which can be found on the blog. This module will be important to informing support planning and allowing the individual to tell his/her story. Sections within this module include:
  - Personal Profile- Opportunity for the individual to share information that is important for others providing him/her with help to know.
  - People Important to Me- Identify people who are important in the individual's life.
  - Support Planning Meeting (If not used online, will contain further discussed with individual)- Schedule in-person assessment meeting and what additional accommodations and individuals should be involved.
  - My Future- What the individual would like to see in his/her future.
  - Service Related Preferences- Preferences for how services are delivered.
- This Person-centered Module will be evaluated and implemented in conjunction with the TEFT Personal Health Record (PHR), and Kelly Wilson, who is leading HCPF's efforts with TEFT, said that the automation of the tool will continue to be discussed with this group as discussions with IT vendors move forward.
- Shirley York reminded the group that providing the information within the Person-centered Module will be voluntary and controlled by the participant.
  - Tim Cortez said that it will also be important to make sure that participants know the benefits of providing the information.

Meeting Minutes

Specific Stakeholder Feedback on the Person-centered Module

- Collecting information about what an individual would like to have known about strengths and challenges was added as a result of stakeholder feedback. Based on feedback from the December meeting, items about who should have access to information collected in the PC module is included. The sharing protocol will need to be developed in conjunction with the online system, but an initial look at this will be included in the March presentation of the module.
    - *It was suggested that in addition to challenges, a question on Concerns/Worries should be added.*
- It was suggested that Transportation be added to the goals section within the My Future Section. Steve Lutzky said that often time transportation is more of an action step than an actual goal. This will continue to be evaluated.
- Carol Meredith wanted to ensure that information is collected in a way that would effectively prompt individuals with mental health issues. Chandra Matthews said that they have recently implemented the MyChoices program, and that they have struggled with collecting information from individuals with mental health issues, perhaps as a result of framing the question. It was pointed out that completing this information is a personal choice, and does not have to occur.
    - Julie Farrar and Jose Torres-Vega said that participants need to know that providing this information is optional and to make sure it is collected in a friendly way that allows information to be updated on an on-going basis.
- Question 5 in the People Important to Me section, *are there any individuals that you do not want to contact you or should not be around you*, was added based upon stakeholder input at the December meeting.
    - Julie Farrar asked what the outcome would be as a result of providing information about individuals the participant does not want to have contact with. Steve Lutzky responded that this could be a good indication of individuals who should not have access to the individual's information.
    - There was a concern that people may not want to give up family contact or be willing to identify potentially harmful individuals. There was also a comment that it may be important to inform the individual that Mandatory Reporters would be required to report some information if they were to view it. *Shirley York said that perhaps it would be helpful to add text after that said if you are being abused or exploited, contact this entity.*
- Steve Lutzky said that some of the items in the Support Plan Meeting Section could be placed at the end of the Intake and Eligibility Screen and that stakeholder input on what should be included/excluded will be very helpful.
- Question 4 in the Service Preferences Section was added based on stakeholder feedback about needs vs. wants. The item is designed to help understand the individual's priorities and any acceptable options for alternative arrangements if the participant's preferences cannot be immediately made available.

Next Steps

- As stakeholders review tools, modules, and other documents, Steve Lutzky asked that they provide feedback either on the blog at http://coassessment.blogspot.com or email andrew@hcbs.info.