

Blueprint for Adult Day and Employment Services Workgroup
Wednesday January 29, 2020 9:30 a.m. to 4:30 p.m.
Thursday January 30, 2020 9:00 a.m. to 3:00 p.m.
Ohio Department of Administrative Services- Surface Rd.
Meeting Summary

Day One: January 29, 2020

Members Present: JoElle Barath (OACB), Aaron Bracone (PALS), Carl Brass (Value and Faith Alliance), Peggy Connolly (Family Representative), Bill Darnell (Advocate), Chris Filler (OCALI), Vic Gable (APSE), Jerilyn George (APSI), Jessie Green (Ohio Statewide Coalition), Debbie Jenkins (OHCA), Shannon Komisarek (OOD), Joe Kowalski (OHCA), Scott Marks (OPRA), Kyle Miller (Fairfield Co. BDD), Dan Ottke (SEC), Liz Owens (OPRA/Alpha Group), Janet Pell (Provider Representative Adult Day Support), Kathy Phillips (OWN), Nancy Richards (OSDA), Michael Richards (People First), Kurt Smith (OPRA/ARC Industries), Mary Thompson-Hufford (Fuse Network), Gary Tonks (Arc of Ohio), Jeff Turner (OSDA), Chase Waits (FAC Core Group), Kraig Walker (People First of Ohio), Drew Williams (Summit Co. BDD), Annette Wood (OWN)

Members Absent: Rick Black (OACB), Carolyn Knight (DD Council), Meredith Mendoza (Arc of Ohio), Elizabeth Stephens (OOD)

DODD and ODM Attendees: Lisa Ahlersmeyer, Stephen Begala, Steve Beha, Stacy Collins, Nyoka Cradolph, Kim Hauck, Nick Miller, Lyndsay Nash, Nicole Northrup, Jacquelyn Rigutto (ODM), Lindsay Terry-Stine, Neil Townsend, Jeremiah Wagner, Clayton Weidner, Ginnie Whisman, Debbie Hoffine

Consultant: Jacqui Romer-Sensky, The JRS Group, Ltd.

1. Welcome/ Introductory Remarks/Purpose of the Group

DODD Director Jeff Davis kicked off the Blueprint effort with welcoming remarks. He expressed his appreciation for everyone's willingness to contribute to this meaningful and important work. He pointed out the immense talent and knowledge in this group, representing the entirety of our system. The participation of several DODD staff is meant to demonstrate the commitment of our department to participating in drafting adult day recommendations and supporting the needs of the Blueprint Group over the next year. Director Davis also thanked the Ohio Department of Medicaid (ODM) and Opportunities for Ohioans with Disabilities (OOD) for taking seats at the table.

Fundamentally, the charge to this group is to consider what the adult day array looks like today and what we could make it in the near future. In summary, Director Davis asked members to:

1. Please accept his personal and departmental appreciation for participating.
2. Please show some patience as we get into a flow for compiling the right recommendations.
3. Recognize this is a personal, passionate topic. We need to be honest and candid.
4. Finish with ownership of “our” products.

2. Introductions, Agenda Review, & How we will work

Jacqui Romer-Sensky went over the general structure and housekeeping items for the workgroup. She reviewed structure, group rules, workgroup process, and ways to stay informed.

3. Review The Workgroup Charter

Kim Hauck, Chief Policy Officer, welcomed everyone to the workgroup and Stacy Collins, Employment and Community Life Lead, reviewed the workgroup charter (link to charter on EF site). Participants reviewed the Charter and provided input. Some minimal suggested revisions were noted, and the group will adopt a revised Charter at the next meeting

4. The Planning Context (History, Medicaid, Adult Day, Financials, Stakeholder Input, Transition Lessons Learned)

State staff provided a wide range of data points and background materials to set a level foundation of knowledge across all group members. Stacy Collins reviewed the history of work at DODD regarding adult day and employment services. Lindsay Terry-Stine and Stacy Collins reviewed data related to current adult day and employment services in Ohio. The data reviewed included statewide service and support data, Home and Community Based Waiver billing data, and National Core Indicators data. Jacqui Rigutto reviewed Medicaid 101 information including history of Medicaid in Ohio, Developmental Disabilities Waivers, and Centers for Medicare and Medicaid (CMS) regulations and technical guides. Clay Weidner reviewed funding and financing information related to the past, present, and future of our service delivery system.

History

A high-level review of the system’s governance structure was provided as well as a history of the three phases of adult day changes since 2011 including major rules changes that were implemented in 2017. (See handout)

Members discussion:

- Prior group work regarding how people were paid. It resulted in nine categories and a robust discussion regarding whether Medicaid can pay people. DODD published resulting Guidance Documents in August 2019 to clarify how people can be paid. There still may be some issues within this topic that will need to be addressed within Blueprint recommendations.
- The group also talked about the difficulty of finding accurate employment numbers. Ohio frequently uses percentages instead of actual numbers. DODD & OOD are working on generating better data.
- How is "success" defined. Some say "one hour of employment per week" is employment. Families know this isn't right.
- There are County Board requirements to report the hours, wages and transportation services associated with individuals. Data is also be collected for facility-based and community-based employment. The reporting period closes March 31st, so we will have better data for Blueprint members about 60 days later.
- Must be mindful of defining the word "outcomes." Generally, define "outcome" as a result. We also use it as an upfront term when individuals are planning.

Medicaid

ODM provided an overview of Medicaid services and administration in Ohio. (See handout)

Member Discussion:

- CMS and ODM have clarified that Medicaid dollars cannot be used for sheltered work performed in a facility. [Vocational Habilitation Services 101](#) document can be helpful. May need a statement that shares that what is clearly allowable now; even if Ohio and CMS previously allowable Waiver utilization due to misinterpretations or misunderstandings. The BEST workgroup is moving Ohio into compliance.
- Inquiries were made regarding if an individual who no longer attends workshop or adult day can use Medicaid funding to support volunteer activities. to volunteer somewhere.
- It is important to change the Medicaid conversations from starting with "what Medicaid service do you want?" to "what do you want to do?" We need to figure out how to finance after we know what the individual wants to do.
- There was discussion about the conflict between what Medicaid waivers allow and Department of Labor (DOL) regulations. For example, Medicaid says an individual can be paid for working flexibility while on a waiver. However, DOL says no. Points to the possibility that some Blueprint recommendations may need to initiative advocacy for federal changes.
- Adult day guidance was issued to help provide clarity.

- There are clear Medicaid rules on what can be funded in facility settings. Are we as clear about what can be funded in community-based?

Programs

Presenters noted that the data being presented is the best availability to the system at this time. There are issues with fidelity of some data and state-wideness of the data. The State can only report on what is currently collected. Members reviewed a broad spectrum of data regarding adult day, employment and transportation services. (See handouts)

Member Discussion:

- What are the trends. Is population increasing? Are individuals each getting more services? What is driving cost increases? The team will try to bring more data to the next Blueprint meeting.

Financials

The group received an overview of funding trends since 2006 as well as basic financial and rate information for today's system. (See handout)

Member discussion:

- It is interesting to consider Ohio as third highest amount of funds invested. It makes you consider how we spend the funds versus how much we have to spend.
- It is a solid point that the current funding and rate system reflects what was need at the time it was implemented years ago. There is a need to re-think the approach for go-forward progress.

5. Stakeholder Input

Members reviewed input from Blueprint sponsored group discussion sessions and the provider-based visits conducted by members. (See handout)

Member discussion:

- Beyond the summary findings, members shared additional insights from site visits:
- It will be important to consider how to best help those with criminal justice issues move forward.
- There are issues with helping individuals with developmental disabilities retain jobs once they are employed. For some, it seems like the same group of people keep cycling through the system. The data may not capture this aspect of employment services.
- Many employers need help understanding what to expect when hiring the person.

- The system is asking Direct Support Professionals (DSP) to go in the community and do more complex things. DSPs are asked to be teachers, and the rate and skill sets don't match.
- Providers who serve high-needs folks with high staffing ratios survive financially by piecing together all kinds of funds, including private fundraising. There is a major challenge in how to measure acuity with people with high-behavioral needs.
- People want to do the right things, but they are confused. The system requires better communication. Providers are working so hard to meet needs and make payroll that they may not have time to go out and seek information.
- The people we met with really want to do the right thing.
- The severity of workforce issues cannot be overstated. There also may be too many expectations placed on staff.
- There are significant challenges for people in workshop in regard to their ability to move into competitive employment. Recognize that some families have come to rely on workshop paychecks.
- Providers are struggling with the loss of the "combo" rate.
- At present, the Individual Service Plan (ISP) does not capture an individual's history. This can come into play in making good decisions now.
- There were concerns voiced about schools and how to make better transitions from school to the adult service system.

Day Two: January 30, 2020

Members Present: JoElle Barath (OACB), Aaron Bracone (PALS), Carl Brass (Value and Faith Alliance), Peggy Connolly (Family Representative), Bill Darnell (Advocate), Chris Filler (OCALI), Vic Gable (APSE), Jerilyn George (APSI), Jessie Green (Ohio Statewide Coalition), Debbie Jenkins (OHCA), Carolyn Knight (DD Council), Shannon Komisarek (OOD), Joe Kowalski (OHCA), Scott Marks (OPRA), Meredith Mendoza (Arc of Ohio), Kyle Miller (Fairfield Co. BDD), Dan Ottke (SEC), Liz Owens (OPRA/Alpha Group), Janet Pell (Provider Representative Adult Day Support), Kathy Phillips (OWN), Nancy Richards (OSDA), Michael Richards (People First), Kurt Smith (OPRA/ARC Industries), Mary Thompson-Hufford (Fuse Network), Jeff Turner (OSDA), Chase Waits (FAC Core Group), Kraig Walker (People First of Ohio), Drew Williams (Summit Co. BDD), Annette Wood (OWN)

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Jacquelyn Rigutto (ODM), Lindsay Terry-Stine, Neil Townsend, Jeremiah Wagner, Clayton Weidner, Ginnie Whisman, Debbie Hoffine

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1. Welcome and Support for Group Purpose

ODM Director Maureen Corcoran also welcomed members of the Blueprint Group. She shared that her lifelong passion has been health care and Medicaid and how it impacts people in need, particularly individuals with mental illness or developmental disabilities. She shared working with the State of New York for several years as it examined its home and community-based rule and surveyed their providers for a depth of understanding of what needed to change to support the mission. The guide stone for that work was “this was as significant of a civil rights movement as what we’ve seen in this country with African Americans.” When considering Medicaid’s impact on the system there are rules, and there is compliance, but, fundamentally, Director Corcoran said this is about a life well lived; not services. We need to understand how things work at the level of a person.

ODM knows this group may generate recommendations around individual choice and the settings rules, the adult day service scope, and transportation. The caution is to focus on what is most important or vital to take forward to CMS. For context, the federal government is pushing states on MFAR (Medicaid Fiscal Accountability Rule), MFAR is putting a lot of focus on state financing of all Medicaid services.

In summary, Director Corcoran shared that she

1. Brings her background in mental health and DD to this project, and she is very pleased to have Jackie Rigutto on the team and will back up what she needs,
2. Recognizes this is not an easy conversation and is glad to see diversity of perspective and thought around the table; and
3. Wants to support move to “self-direction,” and urged the group to review the system with fresh eyes toward flexibility.

Member Discussion:

- Health care accounts for 20% of an individual’s overall well-being. There is convergence in health care around the social determinants of health. Managed Care Plans are collecting information on these determinants. This conversation is about putting in a wider variety of supports for individuals to secure better outcomes, i.e. food, housing.
- Review what CareSource is doing with “Life Services” for Blueprint recommendation ideas.

- Think about what the State could also do to incentivize employers in the broader context across the entire Administration. Ohio's economy requires the participation of all people to move forward.
- The ultimate goal is better quality. The case management function sometimes struggle with staying neutral when they would like to promote a quality service or make a recommendation to an individual. The federal principle is that that this neutrality is a solid safeguard to protect the individual's right to choose. We could look at some kind of statewide provider or service rating or published quality information that could be shared.

2. SWOT

The group reviewed a sort of stakeholder input into a Strengths, Weakness, Opportunity, Threats analysis. After substantial conversation, group members submitted edits and additions to the draft document. The group's input will be used to create a second draft of the SWOT that also further consolidates thoughts for readability. Draft two will be discussed at meeting two.

3. Identify Current System-Change Drivers

System-change drivers are internal or external factors that exert pressure on the current approach/program/system to change or alter today's approach. It's important to identify system-change drivers because the group's ultimate recommendations need to address the most important drivers to justify the time and resources associated with implementation. The design must address the demand.

The group identified many significant system-change drivers for their charge. What compels the need to continue changing and modernizing the adult day and employment services system?

Within a larger list of important considerations, the following preliminary draft list represents a prioritized list of System Change Drivers:

1. The system must find balance between fiscal sustainability and individuals attaining a meaningful life in the community.
2. They system needs to help individuals lead a fulfilled life with flexible, quality supports. This includes individual choices and control.
3. Federal regulations, compliance and accountability standards must be fully observed in a workable system.
4. The complex system must be simplified. Re-design must simplify supports, services and administrative operations while adhering to all relevant guidance.
5. Families need to have flexibility and clear options for proper support.

The following preliminary draft list was identified in small group work by major system actor.

Client / Individual	<ul style="list-style-type: none"> • People want to do things that make them happy. • To live like everybody else. • Choices and control. • Fulfilled life with flexible, quality supports.
Family	<ul style="list-style-type: none"> • Simplify supports that keep loved ones safe and happy. • Communication and reliability for loved ones. • Flexibility, proper supports, clear options, understand the system. • Security and inclusion. Easier access points to multiple systems.
Provider	<ul style="list-style-type: none"> • Flexibility and resources to help people live their best lives. • Sustainability, stability. • Consistency, more support for people with complex needs, opportunity to make things better. • Flexibility and clarity to meet competing pressures and expectations.
County Boards of DD	<ul style="list-style-type: none"> • A simplified, sustainable system that ensures individuals have unique and relevant services as their role shifts. • Established community identity after direct service divestment. • Be seen as the local entity that supports people. Streamline the system. • Continue to be seen as a resource and a valuable part of the community.
State	<ul style="list-style-type: none"> • A fair and balanced system that meets evolving expectations. • Balancing federal regulations while managing a working system. • Follow federal rules. Seek long-term financial sustainability. Mission drive, a civil-rights perspective. • Simplify supports and services while adhering to guidelines and regulations.
Federal	<ul style="list-style-type: none"> • Finding balance between fiscal sustainability and attaining a meaningful life within their communities. • Compliance and accountability. • Civil rights for people. Spending less money. Give people more opportunities. • Citizens are healthy and economically stable using stated flexibility.
Advocacy	<ul style="list-style-type: none"> • People live the life they want not based on the funding they receive. • To have a valued voice and be heard.

	<ul style="list-style-type: none"> • Expand choices in where you work and live. More access. • Voices heard and that results will change.
General Public	<ul style="list-style-type: none"> • Transparency and public purpose. • Accountability to the public. • Responsible use of their tax dollars. Feel good that their property taxes are being used to support people with developmental disabilities. • Assurance that funds are spent wisely.
Others	<ul style="list-style-type: none"> • Economy, workforce and education. • Legislative accountability for funding • Private enterprise – Workforce crisis helps spur the likelihood that they will hire someone with a disability. • Pay for things that people want. Basic accountability.

4. Guiding Principles:

The group agreed to defer this discussion to meeting two.

5. Scenario Planning:

Small group work began on setting a vision for what the adult day array programs could look like in 2025. Preliminary concepts were developed, but not at any level of detail. More work associated with establishing the vision will occur at meeting two.

6. Final Meeting Message

- We came together to discuss potential changes to the adult day/employment services/ and transportation package in Ohio.
- We set the groundwork to begin how to tackle these complex issues.
- I'm hopeful we'll make great changes. We're going to be working on this through December.
- As we move forward, I welcome your creative ideas, thoughts or potential solutions. But, please be patient, it's a process.

Action Item Log

#	Action Item	Who	When
1	Revise Outlook appointments for 9:30am-4:30pm	JB	02-03
2	Complete photo roster and post on TEAMS	JB	02-14
3	Show actual # changes versus percentage improvements in employment.	IST	Mtg 2
4	Check CMS guidance regarding: "Primarily"	JR	Mtg 2
5	Trend data; believe # of people increasing, costs may be going down as people enter employment	IST	

6	Find out how many Place 4 in VocHab	IST	
7	Revise SWOT analysis document per the group's direction	JRS	Mtg 2
8	Develop menu of measurement options for Vision Targets (Adult Day, Employment, Transportation). Collectible now and Could be Collected	IST	Mtg 2
9	Polish and integrate selected Program 2025 Scenarios	JRS/SC	Mtg 2
10	Going forward, what are the five main things about this work that we need to be communicating consistently.	All	

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