

These minutes contain materials which paraphrase and/or summarize statements made during this session. Only text enclosed in quotation marks

report a speaker's exact words. For complete contents of the proceedings, please refer to the tapes.

JOINT COMMITTEE MEETING SENATE COMMITTEE ON HUMAN RESOURCES AND SPECIAL HOUSE COMMITTEE ON CHILDREN'S ISSUES

Wednesday February 27, 1991 Hearing Room A 3:15 p.m. Tapes 32 - 33

SENATE HUMAN RESOURCES MEMBERS PRESENT: Sen. Bill McCoy, Chair Sen. Cliff Trow, Vice-Chair Sen. Shirley Gold Sen. Bill Kennemer Sen. Paul Phillips

HOUSE SPECIAL COMMITTEE MEMBERS PRESENT: Rep. Bob Pickard, Chair Rep. Vera Katz, Vice Chair Rep. Mary Alice Ford Rep. Rep. Carolyn Oakley Rep. Beverly Stein

VISITING MEMBERS: Rep. Ron Cease Rep. Hedy Rijken

STAFF PRESENT: Janice J. Fiegenger, Committee Administrator Mike Meriwether, Research Assistant Lee Penny, Committee Administrator Carolynn Gillson, Committee Assistant Andra Woodrum, Page

ISSUES CONSIDERED: Innovative Local Case Management Initiatives Reports from Lincoln County and Hermiston Partners Project, Portland Public Schools

These minutes contain materials which paraphrase and/or summarize statements made during this session. Only text enclosed in quotation marks report a speaker's exact words. For complete contents of the proceedings, please refer to the tapes.

TAPE 32, SIDE A

007 SENATOR BILL MCCOY, CHAIR: Calls the meeting to order at 3:20 p.m.

Innovative Local Case Management Initiatives Witnesses: Gary Weeks, Department of Human Resources (DHR) Marilyn Stolz, Employment Division, Hermiston Steve Sparks, Children's Services Division (CSD), Hermiston Eva Mabbott, Adult and Family Services (AFS), Hermiston Dr. Kenneth Settlemeir, Lincoln County School District Fran Hannon, CSD, Lincoln county Georgia Stone, Lincoln County Housing Authority

012 GARY WEEKS, deputy director, DHR: Briefly describes two projects. > The Hermiston County project, a multi-service center concept involving human service agencies, has been in the planning stages for one year. > The Lincoln County Combined Case Management Project has been underway since 1988.

051 MARILYN STOLZ, manager of the Hermiston field office of the Employment Division: Gives the committee an overview about the formation of the multi-service center in Hermiston. > Leases for DHR and Employment

Division offices will expire October 1, 1991. Talked to DHR about co-housed facility. > Can do more for clients if offices are located in more central area and resources are pooled. > Area has grown and the need for services has increased - 50 to 70 percent of Umatilla county services are needed in the Hermiston area. > Early in program planning. > Other human service providers enthusiastically support the multi-service center.

112 STEVE SPARKS, supervisor for CSD in Hermiston office: Began strategic planning process recognizing services in the Hermiston area are very fragmented and piecemeal. > Lists the other agencies involved in the multi-services center: Employment Division, CSD, AFS, Head Start, WICK, Vocational Rehabilitation, Domestic Violence, SDS and Volunteer Services. > Working with schools, local mental health clinic, and law enforcement agencies. > Goal of providing a comprehensive social service network that will involve multi-disciplinary assessments of families that are in crises in the community. > Exploring concept of co-managed system involving state, county and local levels. > Efforts borne out of recognition that families have multiple problems and issues that cut across agency lines and boundaries. > Have set up employee-based work groups with support of regional administrators. > Reviews techniques being used to improve delivery of services to clients.

191 EVA MABBOTT, manager of the Hermiston AFS branch office: Want a facility that removes common facility barriers. > Propose common work area where interaction occurs. > Encourage common training. > The Job Training Partnership Act (JTPA) is important part of welfare reform. > Want one-stop shopping.

214 SEN. CLIFF TROW: Describes a similar project in Corvallis that failed. Suggests looking at why that failed.

230 REP. VERA KATZ: Just because you are under one roof doesn't make it work. Need vision and commitment and no protective turf.

236 REP. MARY ALICE FORD: Speaks about another county that did the same thing but it fell apart during the budgeting process.

245 MABBOTT: We have a high level of commitment and good staff support. > Not experiencing the turf issue.

252 STOLZ: Heard of only commitment from Employment Division to work with DHR employees. > Not enough funds to have separate programs.

269 REP. BEVERLY STEIN: Confused about the structure being from the top down and wonder if there is client involvement. > This is a client-centered service system. You need to respect the knowledge and experience of people who have gone through this system.

STOLZ: Customer service is extremely important within DHR. The central office will minimize the embarrassment clients feel who need our services.

302 SPARKS: We are asking for specific recommendations from staff in the field who see the system barriers. Regional administrators have a commitment to the work group to address issues of policy, federal waivers, funding, confidentiality, staffing and other kinds of issues that may arise. > There will have to be an attitudinal change. We are looking at the family wholeistically and addressing needs systematically.

334 REP. STEIN: What barriers at the state and federal levels are in way of doing a fully integrated system?

MABBOTT: Different confidentiality policies prohibit sharing of information. > Different support systems need to be integrated. > Staff and training issues are barriers we can overcome.

SPARKS: There are attitude, personality and organizational barriers to be addressed. > Hope to get administrative support to cut through some of the barriers.

387 CHAIR McCOY: How soon will you be jointly housed?

STOLZ: Explains that services are spread out from Pendleton to Hermiston. > Hope to accomplish co-housing by February, 1992.

428 DR. KENNETH SETTLEMEIR, Lincoln County School District: Follows the presentation outline in their testimony concerning the Lincoln County Case Management Project (EXHIBIT A).

TAPE 33, SIDE A

007 SETTLEMEIR: Family problems have deepened over the past 10 years. Children from multi- needs families are not as able to function in educational settings. > It is an interagency effort - narrow eligibility criteria and paperwork get in the way. > Looking at an integrated delivery system not a coordinated system. > Reviews the steps they followed for constructing a pilot project and refers to survey results on page 2 of his handout. > Reviews their goals listed on page 3 of his testimony. Explains how access is difficult. > Reads the assumptions listed on the Combined Case Management Flow Chart (attached to his testimony). > Reviews how clients with multiple needs flow through three levels of services. > Level IIB is the heart of the program. > Would like to have case management offices available in every part of the county possibly housed in a central school building. Staffs in the main agency office would be significantly reduced.

167 REP. KATZ: As you reorganize these agency structures, there is no huge up-front costs for hiring additional staff.

SETTLEMEIR: In its final stage, we want the project to be budget neutral. > Reviews level IID, providing or coordinating enrichment activities. > Talks about the periodic case evaluation that exists between each level. > Level III would require monthly visits. > Level IV would require quarter monitoring.

216 REP. KATZ: Will you describe your case management approach?

SETTLEMEIR: The team would be supportive of one another but not necessary meet with the family unit as a team. Each family has a person they work with, and a backup person is available. Families are not forced to go to more than one person to get access to service.

REP. KATZ: The case manager facilitates the contacts, the information and the service for that client.

253 FRAN HANNAN, Lincoln county branch manager for CSD: Talks about agency agreements or partnerships with state and local agencies, funding sources and future needs. > Increases access to integrated comprehensive

services and accelerates the intake process for the client with the various agencies. > Describes two partnership project agreements for voluntary programs that have taken place. > DHR is working to make the confidentiality easier. > We do not have additional money for future funding. Only funded through June, 1991. We do have an interagency agreement with over 15 agencies for them to sponsor this project.

338 REP. BOB PICKARD: Review what you said about confidentiality?

HANNON: Since the clients are volunteering and signing a release of information, we decided the agencies can share their records with each other. We are working with DHR on a formal process for confidentiality.

SEN. TROW: Has your program been underway long enough to track success?

HANNON: Only in operation a couple of months. The demand from families volunteering to take part speaks to our success.

396 REP. STEIN: Interested in decategorizing funds. > In Iowa, a flexible pot of money was given to the case workers which they could use at their own discretion to fill in the blanks where there is a need that cannot be met by another category. Is this involved in what you are doing?

SETTLEMEIR: We have about \$16,000 a year designated as flexible dollars available to the caseworkers. We are putting together some flexible guidelines for spending that money. > Talks about brokering with other agencies for client services.

REP. STEIN: Another way is to get waivers for using money from one pot.

TAPE 32, SIDE B

020 SETTLEMEIR: CSD has asked us to help identify what things get in the way of servicing clients.

030 GEORGIA STONE, executive director of the Lincoln County Housing Authority: Presents update on client selection and services, where they are today and where they hope to be by June 30. > Goal is to serve ten families, five per case worker. > Describes the six families participating in the project so far. > Lists the agencies involved in providing services. > Currently, barriers are being lifted so major basic needs can be dealt with. An action plan will be developed for them. > Intensive services are to be provided at Level II and the caseworker follows through with the families who are ready to move on to other levels by June 30.

REP. KATZ: There are social services that cross agencies that could be provided in one place and then eliminate duplication of services.

115 CHAIR PICKARD: What is the benefit to our state employees involved in delivering these services?

HANNON: Initially, they are concerned about keeping their job. > CSD staff is starting to function in a community center or school building. They don't need to be sitting in a CSD office.

CHAIR PICKARD: There is an unspoken value to employees who are doing a tough job but they may be hesitant to change.

SETTLEMEIR: People need to feel successful about what they are doing in order to be motivated. Workers are frustrated with the fragmented system and barriers in place now. We believe there will be less turnover among those workers with the combined case management project.

185 SEN. TROW: How long does a caseworker work with a family and how many families are helped in one year?

SETTLEMEIR: We are starting with five families to test the system. By June, we hope to have 10 families at Level II per caseworker. The caseworker remains with the family as it progresses to the next level where services are less intensive. A caseworker could eventually have a total of 40 or 50 families in their caseload at one time all at different levels. Families would be in the whole cycle between six and 18 months with an average 12 month cycle.

230 SETTLEMEIR: The quick fix mentality has been a big problem. > Describes a comprehensive evaluation system that was developed in conjunction with the project. Hope to have data base available at the end of the pilot project. The measurement is over a period of time. The individual plan will identify where we hope to get with families.

300 SEN. TROW: Do you screen people out?

HANNAN: We do screen people out. > Must be a family with children that is dealing with more than one local agency and lives in the Toledo area.

318 SETTLEMEIR: There is a difference between what screens a family out of the program and what screens them in. There needs to be some prognosis of success. Clients not interested in being self-efficient in the long term could be referred to the standard service delivery system.

Partners Project, Portland Public Schools Witnesses: Marianne Stowe, Portland Public Schools Darrell Walker, Mental Health and Developmental Disability Services Division (DHR)

356 MARIANNE STOWE, Portland Public Schools: Reviews her written testimony (EXHIBIT B) concerning the Multnomah County Partners Project funded by the Robert Wood Johnson Foundation. > Outcome has been to decategorizing funds. > Lists the agencies participating in the project to improve the quality of mental health services to youth. > Hopes to provide a more cost-efficient system with more community based options for mental health services to youth. Intends to serve the most severely disturbed students in the county.

402 SEN. TROW: Wouldn't all these children qualify for an individual education plan (iep) that would be coordinated to begin with.

STOWE: 95 percent of these students have an iep and are educationally handicapped under the PL 94-142. It does not result in coordinated services like it should.

STOWE: Talks about the focus of the \$2.4 million grant. There are inadequate services in the county for this population of children.

TAPE 33, SIDE B

003 STOWE: Explains how 53 percent of the mental health services were purchased from private agencies in the community by Portland Public Schools.

REP. KATZ: If school districts funnel the money through the state, they can get a state match and double their resources.

STOWE: This project has accomplished that. > Talks about problems of not having coordinated services.

042 SEN. TROW: What is the most common service you are buying from private agencies for these kids?

STOWE: Psychiatric day treatment and family and individual counseling.

REP. STEIN: Would funding the DARTS programs create a hole in your system?

STOWE: Yes, it would be a tremendous impact on school districts. > Used the Robert Wood Johnson Grant funds to establish the independent Partners Project. > Partners Project case managers make decisions about the level of service an individual child requires. Agencies have given over their decision making prerogative to this entity. > Pooled resources allow for medicaid match and complete flexibility for the case managers for the use of that money.

081 REP. STEIN: Did you have to get waivers to do the pooled resources?

082 DARRELL WALKER, director, Office of Child and Adolescent Mental Health and Developmental Disability Services Division, DHR: The Partners Project represents an innovative and daring pooling of state general fund and local dollars to use as match money for medicaid. > Studied the costs of services for 100 severely disturbed children over a one-year period of time and came up with average cost per child. > Describes the model they are following for purchasing services.

114 LEE PENNY, Committee Administrator: Does the evaluation of the child by the Partners Project take the place of the evaluation of a special education child by a multi-disciplinary team?

STOWE: Generally not.

120 JANICE FIEGENER, Committee Administrator: How long did it take to obtain waivers from the federal Health Care Finance Administration (HCFA) and can they be used in other communities of the state?

WALKER: There is an agreement with HCFA that we do not exceed the amount allowed for services and this flexible model can be used statewide if the project is found to be a cost effective and an efficient way of providing services.

136 MELAINE ZERMER, Committee Administrator: Requests the details of the agreement be provided to the committee members.

146 CHAIR McCOY: Adjourns the meeting at 5 p.m.

Submitted by:      Reviewed by:

Janice Fiegenger Carolynn Gillson Assistant                      Administrator

EXHIBIT LOG: A      -                      Lincoln County Combined Case Management Project

report - Kenneth Settlemier - 10 pages B- Multnomah County  
Partners Project report - Marianne Stowe - 3 pages