

Olmstead Plan Stakeholder Advisory

Quarterly Meeting Minutes

February 22, 2024

Office of the Senior Advisor for Olmstead and Transitions to Community Living's Holly Riddle called the meeting to order, welcoming the members of the Olmstead Plan Stakeholder Advisory (OPSA), including its Community Co-Chairs, Bryan Dooley and Betsy MacMichael; Ethan Brinkley from Representative White's office; and Candace Bowden from Senator Lee's office. She then introduced Deb Goda, Senior Advisor for Olmstead and Transitions to Community Living.

Ms. Goda shared regrets from the NC Department of Health and Human Services' (NCDHHS) Deputy Secretary Debra Farrington who was unable to attend the meeting. Ms. Goda acknowledged the NC General Assembly for the significant investment it has made in behavioral health, intellectual and other developmental disabilities (IDD) and other disabilities, inclusive of wage increases for Direct Support Professionals; investments in IDD home and community-based services and competitive integrated employment. These investments are crucial to the Olmstead Plan's success. She observed that the Plan was closely coordinated with, among others, such initiatives as Transitions to Community Living (TCL) and Money Follows the Person and that it impacted individuals served in Psychiatric Residential Treatment Facilities (PRTFs); the IDD system; and the justice system. She emphasized the leadership provided by Community Co-Chairs Betsy MacMichael and Bryan Dooley and turned the meeting over to Ms. MacMichael.

Ms. MacMichael thought it was unlikely that all OPSA members had had time to review the draft Plan but said that today's review of the draft plan would assist all. She opined that the plan was a "positive move forward," representative of "a new approach" to familiar barriers. She asked Ms. Riddle to introduce the Technical Assistance Collaborative's (TAC) Becky Boss, who has recently taken the lead for the TAC following the retirement of Sherry Lerch.

Becky Boss, Ms. Riddle noted, is from Rhode Island, where she gained expertise in addiction and recovery, behavioral healthcare and IDD. Prior to joining TAC, she served as the Chief Operating Officer, Vice President of Strategic Development for a large nonprofit provider specializing in treatment of opioid use disorder in that state and as Director of the Department of Behavioral Healthcare, Developmental Disabilities and Hospitals. Ms. Boss is familiar with systems development based on Olmstead principles, both within the formal service delivery and informal systems. Megan Lee, also of the TAC, will be working with her to support the NCDHHS in plan development and implementation.

Ms. Boss stated that the fourth quarter report was online and could be accessed at [North Carolina Olmstead Plan Implementation \(ncdhhs.gov\)](https://www.ncdhhs.gov/olmstead-plan-implementation). Her presentation to the OPSA, titled *Implementation of North Carolina's Olmstead Plan*, is incorporated by reference into these minutes and is attached.

The new priority areas for the Plan were reported as follows:

1. Increase Opportunities for Individuals and Families to Choose Community Inclusion through Access to Medicaid Waiver Home and Community Based Services and Supports
2. Strengthen Opportunities to Divert and Transition Individuals from Unnecessary Institutionalization and Settings that Separate Them from the Community
3. Address Gaps in Community-Based Services
4. Increase Opportunities for Pre-Employment Transition Services for Youth with Disabilities, and Competitive Integrated Employment for Adults with Disabilities
5. Strengthen Opportunities to Divert and Transition Individuals from the Criminal Justice System that Promote Tenure in and Successful Reentry to Inclusive Communities

Staff Note: Subsequent to this meeting, a sixth priority was added to the Plan in response to public comment, including strong advocacy from the OPSA itself:

6. Promote Workforce Development, Recruitment, and Retention

Ms. Boss described the new Calendar Year 2024-2025 Olmstead Plan in some detail. Highlights of her presentation are as follows:

- The Olmstead Plan is a roadmap addressing the health and wellbeing of children and families, youth, adults, and elders with disabilities.
- The Plan is focused on enabling and supporting choice and advancing independence, integration, inclusion, and self-determination for those with disabilities.
- The 2023-2024 Olmstead Plan included eleven priority areas; this plan has five.
- In this Plan, the NCDHHS has shifted focus from measuring progress with actions to measuring progress as a result of actions.
- The Plan recognizes the significant resource and time allocation required for real system impact.

Each priority has sample baseline data and targeted measures. These were developed under the NCDHHS' contract with Mathematica.

The Plan also includes areas of focus. These are processes or drivers of change and are as follows:

- Engaging People with Disabilities and their Families as Partners
- Engaging Partners at the Regional and Local Levels
- Reducing Transportation Burdens
- Enhancing Opportunities for Community Inclusive Living
- Promoting Information About the Services and Supports Available
- Addressing Disparities in Access to Services
- Developing alternatives to Overly Restrictive Guardianship
- Using Data for Quality Improvement

Ms. Boss described "next steps" as follows:

- The 2024-2025 plan is currently out for public comment; feedback can be submitted to NCOlmstead@tacinc.org.

- Members can provide comments during this meeting and non-members during public comment.
- Revisions will be integrated into the Plan in March.
- Final Plan will be released on April 1, 2024 and cover April 2024 to December 2025.

Discussion following the presentation was robust. Much of it centered on the importance of a comprehensive approach to recruiting and retaining a frontline workforce; the need for non-medical transportation for the Medicaid population; responding effectively to crisis in community settings; supporting individuals with complex medical needs in the community; and measure development.

Mathematica's Kent Davis stated that his team had identified many measures, then brought forward those based on the NCDHHS' priorities and the availability of data. Mathematica is receiving waitlist data and is using this and other data to develop measures to align with each priority. There are measures that don't fall into the current priorities, Mr. Davis noted. These may be added over time and as resources permit, he said. Mathematica is assessing data quality as part of its measure development task and encourages standardized and complete data be used to inform the measures. Mr. Davis shared that Mathematica and the NCDHHS intend to work with Local Management Entity/Managed Care Organization (LME/MCO) data submitters so that the LME/MCOs understand which registry report fields are essential for Olmstead reporting.

Ms. MacMichael noted that some families distrust "the community" and there is also a concern that providers won't invest in innovative services without the rates to make these profitable. As a result, she said, the General Assembly has been reluctant to invest more funds without evidence of positive outcomes stemming from what they have already invested. It is important, she noted, that success stories are shared with members of the General Assembly and progress be published. The members of the General Assembly need to see that the money they are investing is doing good things, she said. Ms. MacMichael closed by commending the three-week public comment period and urged the OPSA's members to share the draft Plan widely.

There being no further comment, the meeting was adjourned.