

## **COUNTY SOCIAL SERVICES 28E GOVERNING BOARD AGENDA**

To: County Social Services Board Members

From: Mary McKinnell

Date: July 27, 2022

Re: County Social Services Board Meeting

Date: July 27, 2022

Time: 10:00 A.M.

**Time and Location:** Wednesday, July 27, 2022, 10:00 am at the Grundy County Conservation Office located at 204 4th St, Morrison.

Although we prefer to have in-person attendance for the Board meeting, we do understand that is not always possible. Please utilize the information below to attend virtually, if needed.

County Social Services Board Meeting

Wed, Jul 27, 2022 10:00 AM - 12:00 PM (CDT)

**Please join my meeting from your computer, tablet or smartphone.**

<https://meet.goto.com/531572453>

**You can also dial in using your phone.**

United States: [+1 \(224\) 501-3412](tel:+12245013412)

**Access Code:** 531-572-453

1. Call County Social Services Board Meeting to order.
2. Approve today's agenda and the minutes of June 2022. Discussion/Action.
3. Adult Services Provider Representative, Brittney Montross. Feedback.

### **Human Resources**

4. 3% Salary step schedule with option to increase based on COLA effective FY24. CSS will monitor revenues over the next 2 years and revisit this if necessary. Discussion/Action
5. Communications Coordinator, Charity Anfinson wage increase to \$22.00 per hour effective the first full pay period after July 1, 2022. Discussion/Action

### **Executive Committee**

6. Finance Manager, Lisa Trainer salary increase to \$72,800 effective the first full pay period after July 1, 2022. Discussion/Action

### **Organization**

7. On July 1, 2022, DHS announced a 4.25% rate increase for Medicaid HCBS waiver and habilitation services. Therefore, CSS is increasing our region rates for these same services effective July 1, 2022. Review and action to authorize Chair to sign revised Attachment As for the 12 affected providers.

8. First Judicial District has requested a revision to the Black Hawk County Judicial Hospitalization Referee Agreement to strike item 7, "State will protect and hold harmless CSS and County from liability arising from any actions, errors, or omissions of State providing services to CSS and County clients. CSS and County will hold State harmless from any liability arising from any actions, errors, or omissions of CSS and County clients." Legal Counsel to State Court Administrator states that Judicial does not have the legal authority to agree to a limitation of liability clause. Discussion/Action.
9. Mary requesting to attend National AOT (Assisted Outpatient Treatment) Symposium in Texas. The Symposium is no cost, asking for travel expenses not to exceed \$1,500. Discussion/Action.
10. Financial report for June of 2022. Discussion/Action.
11. June claims. Discussion/Action.

Pmt Date	\$ Amount
6/30/2022	\$906,191.18

Pmt Date	\$ Amount
7/5/2022	\$255,472.30
7/12/2022	\$120,001.33
7/19/2022	\$44,011.75
7/26/2022	\$179,737.03
<b>Total</b>	<b>\$599,222.41</b>

12. Review Exceptions to Policy.
13. Review and action to authorize the Chair to sign provider agreements and/or rate requests with:
  - Inclusion Connection
  - TASC, Inc.
14. Adjourn; next meeting will be September 28, 2022, 10AM, in Howard County.

## June 2022 COUNTY SOCIAL SERVICES BOARD MINUTES

The June 2022 County Social Services Board Meeting was held in Floyd County at the Floyd County Fossil & Prairie Center in Rockford, on Wednesday, June 22, 2022, 10:00 am and via GoTo Meeting.

Board Members Present: Jacob Hackman, Chickasaw, Craig White, Black Hawk, Jeanine Tellin, Fayette, Roy Schwickerath, Floyd, Heidi Nederhoff, Grundy, Pat Murray, Howard, Mark Hendrickson, Mitchell, Larry Vest, Tama, Gary Rustad, Winneshiek, CSS CEO Mary McKinnell. Via GoTo Meeting: June Klein-Bacon, Children's System Parent Rep. Absent: Greg Barnett, Butler, Larry Schellhammer, Allamakee, Sharon Keehner, Clayton, Kristi Aschenbrenner, Children's Education System Rep, Brittney Montross, Adult System Provider Rep, Eric Donat, Adult System Consumer Rep, Katie Wahl, Children's System Provider Rep.

1. Vice Chair Hackman called County Social Services Board Meeting to order.
2. Motion by Tellin, Fayette, second by White, Black Hawk, to approve today's agenda and the minutes from May 25, 2022. Motion carried.
3. No Adult Services Provider feedback as Brittney Montross was unable to attend.
4. Motion by Murray, Howard, second by Rustad, Winneshiek, to reappoint Kristi Aschbrenner and Katie Wahl to the Children's Behavioral Health Advisory Committee as School and Provider Representative, respectively, for the term 7/1/22 through 6/30/24. Motion carried.
5. Motion by Schwickerath, Floyd, second by Murray, Howard, to rescind motion from May meeting, Agenda Item #7 regarding salary increases. Motion carried. Motion by Schwickerath, Floyd, second by Vest, Tama, to approve the recommendation of the HR Committee at the May 2022 Board Meeting for salary increases effective the first payroll following July 1, 2022. Motion carried.
6. Motion by Schwickerath, Floyd, second by Hendrickson, Mitchell, to approve the Executive Board's recommendation of a mileage increase rate for CSS staff to \$0.57/mile effective 7/1/2022. Motion carried.
7. Motion by Vest, Tama, second by Rustad, Winneshiek, to approve the CSS Work from Home Policy. Motion carried.
8. Effective 7/1/2022 CSS will begin a trial period allowing employees the option to work from home 1 day per week. This policy and the results will be brought to the Board in December 2022 for action.
9. Motion by Murray, Howard, second by Nederhoff, Grundy, to begin a trial period 7/1/22 allowing employee to use 24 hours of Medical Leave per fiscal year for an employee's appointments for a chronic medical/brain health condition, family medical appointments when they require assistance, and when an employee's child is sick and cannot be left alone, to be reviewed in December 2022. Motion carried.
10. Intensive Residential Service Home progress: Laura Payton from Inspiring Lives stated they are working on hiring staff. No update from Elevate CCBHC.
11. CEO McKinnell gave update on North Iowa Regional Services expansion update. They have hired a program manager for the Youth Crisis Stabilization Center and still plan on services starting no later than January 1, 2023.
12. Quality Improvement Coordinator Raina Kellogg gave a presentation on Mobile Crisis Response data from FY2022. As a region we are meeting the required access standards and the service is being used in every county.
13. Motion by Schwickerath, Floyd, second by White, Black Hawk, to allow an additional CSS subsidy not to exceed \$100,000 to Elevate CCBHC for the cost of Mobile Crisis Response Services in FY2022, as allowed in the contract. Motion carried.
14. Motion by Murray, Howard, second by Nederhoff, Grundy, to accept the Financial Report for May.2022. Motion carried.
15. Motion by White, Black Hawk, second by Schwickerath, Floyd, to accept Claims Runs for June 2022. Motion carried.
16. May 2022 Exceptions to Policy were reviewed.
17. CEO McKinnell stated that five staff members will attend the ISAC Annual Conference in August. This is in the budget.
18. CEO McKinnell stated that there will be a statewide Service Coordination Conference in September. Some of our service coordinators who live far from Des Moines may need overnight hotel accommodations.

19. Informational: CSS FY2023 ICAP Renewal Premium came in 19% over budget. Increase of 25% over FY2022 due to insurance marketplace and increased expenditures.
20. Motion by Murray, Howard, second by Rustad, Winneshiek, to authorize the Vice Chair to sign Memorandums of Understanding for General Assistance administration with Butler, Floyd, Grundy and Mitchell Counties. Motion carried.
21. Motion by White, Black Hawk, second by Tellin, Fayette to authorize the Chair to sign provider agreements as presented.
22. Motion by White, Black Hawk, second by Hendrickson, Mitchell, to adjourn. Motion carried. Next meeting will be Wednesday, July 27, 2022, 10:00 am in Grundy County.

<b>CSS POSITIONS</b>	<b>Step 1</b>	<b>Step 2</b>	<b>Step 3</b>	<b>Step 4</b>	<b>Step 5</b>	<b>Step 6</b>	<b>Step 7</b>	<b>Step 8</b>	<b>Step 9</b>	<b>Step 10</b>
Chief Exec Officer	\$108,638.14	\$111,897.28	\$115,254.20	\$118,711.83	\$122,273.19	\$125,941.39	\$129,719.63	\$133,611.22	\$137,619.56	\$141,748.15
Chief Op Officer	\$77,598.67	\$79,926.63	\$82,324.43	\$84,794.16	\$87,517.99	\$90,143.53	\$92,847.84	\$95,633.28	\$98,502.28	\$101,457.35
Reg Coord of										
Disabilities	\$69,838.81	\$71,933.97	\$74,091.99	\$76,314.75	\$78,604.19	\$80,962.32	\$83,391.19	\$85,892.93	\$88,469.72	\$91,123.81
Child Beh Health										
Coord	\$69,838.81	\$71,933.97	\$74,091.99	\$76,314.75	\$78,604.19	\$80,962.32	\$83,391.19	\$85,892.93	\$88,469.72	\$91,123.81
Human Res Dir	\$77,598.67	\$79,926.63	\$82,324.43	\$84,794.16	\$87,517.99	\$90,143.53	\$92,847.84	\$95,633.28	\$98,502.28	\$101,457.35
Finance Manager	\$64,449.31	\$66,442.59	\$68,497.52	\$70,616.00	\$72,800.00	\$74,984.00	\$77,233.52	\$79,550.53	\$81,937.05	\$84,395.16
Quality Impr Coord	\$58,199.00	\$59,944.97	\$61,743.32	\$63,595.62	\$65,503.49	\$67,468.60	\$69,492.66	\$71,577.44	\$73,724.76	\$75,936.50
Service Area Sup	\$58,199.00	\$59,944.97	\$61,743.32	\$63,595.62	\$65,503.49	\$67,468.60	\$69,492.66	\$71,577.44	\$73,724.76	\$75,936.50
Transition Coord	\$58,199.00	\$59,944.97	\$61,743.32	\$63,595.62	\$65,503.49	\$67,468.60	\$69,492.66	\$71,577.44	\$73,724.76	\$75,936.50
Service Coord	\$46,559.20	\$47,997.18	\$49,437.10	\$50,920.21	\$52,447.82	\$54,021.25	\$55,641.89	\$57,311.15	\$59,030.48	\$60,801.40
Case Manager	\$46,559.20	\$47,997.18	\$49,437.10	\$50,920.21	\$52,447.82	\$54,021.25	\$55,641.89	\$57,311.15	\$59,030.48	\$60,801.40
Service Broker	\$46,559.20	\$47,997.18	\$49,437.10	\$50,920.21	\$52,447.82	\$54,021.25	\$55,641.89	\$57,311.15	\$59,030.48	\$60,801.40
Comm Coord	\$40,351.31	\$41,561.85	\$42,808.71	\$44,092.97	\$45,415.76	\$46,778.23	\$48,181.58	\$49,627.03	\$51,115.84	\$52,649.32
Office Specialist	\$38,799.34	\$39,963.32	\$41,162.22	\$42,397.09	\$43,669.00	\$44,979.08	\$46,328.45	\$47,718.30	\$49,149.85	\$50,624.35
Payroll & Ben Spec	\$46,559.20	\$47,997.18	\$49,437.10	\$50,920.21	\$52,447.82	\$54,021.25	\$55,641.89	\$57,311.15	\$59,030.48	\$60,801.40
Intake Coordinator	\$42,679.27	\$43,959.65	\$45,278.44	\$46,636.79	\$48,035.89	\$49,476.97	\$50,952.28	\$52,480.85	\$54,055.28	\$55,676.94

3% Salary Step



**County Social Services  
Communications Coordinator  
Job Description**

**Position Title:** Communications Coordinator  
**Reports to:** Chief Operating Officer  
**Location:** CSS MHDS Region Office  
**FLSA:** Non-Exempt  
**Shift:** As needed to meet the obligations of the position.  
**Salary/Wage:** \$16.20-\$25.00 per hour  
**Legal Reference:** Iowa Code Chapter 331 Section 390(3)(b)  
**Date:** July 2021

**Position Summary:**

County Social Services (CSS) seeks an organized, self-starter, with great communication skills and ability to multi-task as the CSS Communications Coordinator. This position performs all CSS communications duties including CSS website administration, SharePoint data platform, CSS Facebook page, tracking of all CSS equipment inventory, and assists with other day to day operations of business within an office setting.

**Essential Duties and Responsibilities:**

- Must be capable of regular and predictable attendance in order to perform assigned tasks
- Operate various computer and data systems
- Perform various means of communication on behalf of CSS
- Point person who oversees CSS website
- Process confidential claims in a timely manner
- Welcome others who enter the office
- Answer telephones in a professional manner and direct calls to appropriate staff
- Manage email distribution lists and sends out all necessary organizational emails
- Monitor, maintain, and tracking of all CSS office equipment
- Monitor, maintain, and tracking of all CSS vehicles and insurance
- Positive communication and networking with service provider agencies
- Perform other duties as assigned

**Supervision Received:**

Supervision is received from the CSS Chief Operating Officer (COO) or other designated staff.

**Qualifications:**

- High school diploma or equivalent required
- Associate's degree in business, accounting or related field with 1-2 years experience preferred
- Ability to pay attention to details, maintain confidentiality and prioritize tasks to ensure completion of strict deadlines.
- Demonstrated ability to utilize general office equipment, personal computers and various software applications.
- Ability to work under pressure, make informed decisions, plan workload effectively and follow detailed procedures.



- Possess strong interpersonal skills, excel in time management, and be self-motivated and capable of working with little supervision.
- Ability to represent County Social Services in a professional manner.
- Ability to interact and build relationships with all CSS employees, stakeholders and the general public.
- Effective written, verbal, and listening communication skills are required.
- Must possess a valid Iowa driver's license and be insurable under CSS guidelines.

*(Note: The requirements and duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related to, or a logical assignment of the position.)*

**Work Schedule:** Typical office hours are 8:00am-4:30pm Monday through Friday.

**Language Skills:**

Must be welcoming and positive in contacts with others. Must have strong writing skills and the ability to communicate both verbally and in writing.

**Reasoning Ability:**

Must be able to assess multiple complex disability needs and determine effective supports and interventions to alleviate or manage those needs. Must have the ability to apply common sense to solve problems and achieve work objections, and have the ability to recognize work situations that require special attention.

**Certificates, Licenses, Registrations:**

Original proof of credentials by diploma, license, and transcripts is required. Must clear criminal background, abuse registry, and Medicaid fraud checks for consideration of this position.

**Work Environment and Physical Demands:**

The work environment and physical demand characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Position requires frequent interaction with clients, potential clients, outside agencies, and other region employees
- Position requires frequent exposure to stressful situations
- Work is performed primarily indoors
- Position requires frequent use of hands/fingers

*County Social Services is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, CSS will provide reasonable accommodations to qualified individuals with disabilities and encourages prospective employees and incumbents to discuss potential accommodations with the employer. CSS has adopted a policy in compliance with the 2008 Smokefree Air Act.*

**COUNTY SOCIAL SERVICES  
JOB DESCRIPTION  
FINANCE MANAGER**

**Job Title:** Finance Manager  
**Department:** County Social Services (CSS)  
**FLSA Status:** Exempt  
**Salary Range:** \$48,000 to \$70,500  
**Reports to:** CSS CEO  
**Supervised by:** CSS CEO

**POSITION SUMMARY:**

Professional administrative position serving as Finance Manager of the County Social Services Mental Health & Disability Services Region. Under general direction of the Chief Executive Officer (CEO), performs advanced level financial analysis, program feasibility analysis, and management analysis. Prepares, monitors, analyzes and reports on the region-wide budget. The Finance Manager serves as the Fiscal Agent for CSS and works with the Independent Auditor and the Iowa Department of Management.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

- Must be capable of regular and predictable attendance at a specified location in order to perform assigned tasks.
- Compiles detailed financial information for the preparation of the region budget; analyzes/reports on revenue and expenditure growth, trends, and projections; analyzes the effect that changes in revenue/expenditures will have on the budget; works with CEO and COO in preparing the budget for the Annual Service and Budget Plan and financial report for the Annual Report.
- Manages the review of documentation justifying expenditures, expenditure chart of accounts classification, and the monitoring, analysis, and control of expenditures, ensuring full transparency of the financial performance of the region.
- Performs job duties as the Regional Fiscal Agent with Tyler Technologies to maintain an accurate financial accounting system including reconciliation of CSS bank account, etc.
- Monitors expenditures and advises the CEO, COO and appropriate program manager(s) regarding financial and budgetary issues when necessary
- Creates and updates a 5-year projected budget with CEO; analyzes the effects of proposed projects and actions in regards to long-term cost effectiveness.
- Presents financial information for release to the general public by developing content and formatting of material to be provided for publication on a monthly basis.
- Responsible for all accounts payable and receivable activities for CSS.
- Responsible for the management of cash flow within the region.
- Responsible for entering ADP payroll information per CSS department into CSN and Tyler Technologies systems.
- Coordinates the annual independent audit and presents the final report to the CSS Board.
- Attends Executive Committee meetings to prepare for financial questions relating to CSS Board meeting agenda items.
- Provides ongoing research and financial analysis that affects the financial management of the region.
- Attends meetings and participates on committees and special projects as assigned.
- Other duties as assigned.

**SUPERVISION RECEIVED:**

- Supervision is received from the CSS CEO.



**SUPERVISION EXERCISED:**

- Supervises the Part-Time Administrative Assistant position in the Cerro Gordo County office.

**QUALIFICATIONS:**

- Bachelor' Degree in finance, accounting, public administration, economics, statistics or related area required; at least four years of professional-level experience in budget analysis or financial management required. Any equivalent combination of education, training and experience that provides the required knowledge, skills and abilities may be substituted for a four-year degree.
- Excellent written and verbal communication skills are required.
- Must be proficient in computer software applications that include knowledge and hands on experience with computer programs such as Excel, Word and Power Point, or other relevant software related to budget development/forecasting.
- Must have a valid Iowa Driver's License in the State of Iowa and be insurable under CSS's guidelines.

**REASONING ABILITY:**

Must have the ability to apply common sense to solve problems and achieve work objectives and have the ability to recognize work situations that require special attention.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

Original proof of credentials by diploma, license, and transcripts is required. Must clear criminal background, abuse registry, and Medicaid fraud checks for consideration of this position.

**WORK ENVIRONMENT AND PHYSICAL DEMANDS:**

The work environment and physical demand characteristics are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Refer to the "Essential and Marginal Function Analysis" statement for a complete description of essential functions and functional requirements.

*County Social Services is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, CSS will provide reasonable accommodations to qualified individuals with disabilities and encourages prospective employees and incumbents to discuss potential accommodations with the employer. CSS has adopted a policy in compliance with the 2008 Smoke free Air Act.*

## DRAFT Program

Updated 7/7/2022

### Welcome!

Please join us for this one-of-a-kind gathering of national, state, and local assisted outpatient treatment (AOT) champions, implementers, and practitioners. Together, we will learn from one another, build on what we know, and celebrate the lives we are transforming through AOT!

### Who Should Attend?

Judges, attorneys, mental health authorities, mental health providers, hospital administrators, crisis center administrators, law enforcement, mental health advocates, and anyone with a desire to help those with untreated mental illness who are caught in the revolving door of hospitalization and incarceration.

### What is AOT?

Assisted outpatient treatment (AOT) is a tool in the toolbox for civil courts and mental health systems to work collaboratively to help individuals with serious mental illness caught in a cycle of repeat hospitalizations, homelessness, and incarcerations. Individuals who benefit from AOT have a history of inconsistent engagement with treatment, often due to diminished awareness of the need for treatment. AOT aims to motivate and assist individuals with serious mental illness to engage in treatment and ensure that the mental health system is attentive to their needs.

### THURSDAY, OCT. 13

7:30 a.m. Check-In/Continental Breakfast

All

Test your AOT knowledge - Pretest

8:30 a.m. Welcome to San Antonio!

Hon. Oscar Kazen; TX

8:40 a.m. Announcements and Introductions

Sabah Muhammad; Treatment Advocacy Center

8:50 a.m. Opening Remarks

Lisa Dailey; Treatment Advocacy Center

*TAC Report on AOT and the Crisis Continuum*

9:30 a.m. Video: #AOTBecause

Geoffrey Melada; Treatment Advocacy Center

9:45 a.m. Interview with Eric Smith:

	<i>AOT Graduate Bradley Tarr and AOT Monitor Depree Taylor Share their Story</i>	Eric Smith, TX
10:45 a.m.	Break	All
11:00 a.m.	Keynote Address <i>I Am Not Sick, I Don't Need Help!</i> – <i>Research Into Poor Insight and How to Help</i>	Dr. Xavier Amador; Henry Amador Center on Anosognosia
12:00 p.m.	Buffet Lunch	All
1:00 p.m.	Meet in the lobby for photos!	All
1:15 p.m.	<b>Session 1: Workshops</b>	
	A. The Fundamentals of AOT	Betsy Johnson; Treatment Advocacy Center Mona Jiles; TX Greg Hansch; TX
	B. Tips for Improving Your Program	Amy Lukes; Treatment Advocacy Center Melody Joiner; WI Kana Lastovica; TX Carol Stancheffeld; CA
	C. Expanding Your Program's Reach – A Panel Presentation	<u>Facilitator</u> Michael Gray; Treatment Advocacy Center
	o Partnering with Law Enforcement to Maximize the Benefits of AOT	Laura Braun and Det. Cassandra Bailey; NM
	o AOT as an Alternative to Competency Restoration	Brian Shannon; TX
	o Building State and Local Partnerships to Expand AOT	Hon. Robert Wonnell; KS
2:30 p.m.	Break	All
2:45 p.m.	<b>Session 2: Workshops</b>	
	A. Creative Methods for AOT Evaluation and Program Improvement	Elizabeth Sinclair; Treatment Advocacy Center

B. Engagement Skills for Treatment Providers and Court Personnel (An introduction to LEAP)

Dr. Xavier Amador; Henry Amador Center on Anosognosia

C. Focus Group: What do families want out of AOT?

Kathy Day; Treatment Advocacy Center  
Leslie Carpenter; IA

4:00 p.m. Reception on the Patio

All

7:45 p.m. Optional Activity – Riverboat trip (\$10 Fee)

## FRIDAY, OCT. 14

7:00 a.m. Continental Breakfast in Ballroom

All

Texas Delegation Breakfast (in private dining room)

Host: Hon. Oscar Kazen; TX

7:45 a.m. RAFFLE! You must be present to win!

All

8:00 a.m. *The Power of Information in the Practice of AOT*

Elizabeth Sinclair Hancq; Treatment Advocacy Center  
Kelli South; Treatment Advocacy Center

8:30 a.m. Guest Speaker

Corey Minor Smith; OH

*The Child is Father of the Man:  
Parenting, Protecting and Piloting our Troubled Mothers and Fathers*

9:30 a.m. Scenario Based Roleplay

Facilitator

*AOT: A Best-Case Scenario*

Betsy Johnson; Treatment Advocacy Center

10:15 a.m. Break

10:30 a.m. **Session 3: Workshops**

A. The Roles for Family in AOT, Bystander through Advocate

Dr. Daniel Garza; NY

B. Protecting Participants' Rights

Daniela Chisolm; TX  
Hon. Amy Parsons; TX  
Michael Gomez; TX

C. Peer Support in AOT

Amy Lukes; Treatment Advocacy Center

11:45 a.m.	Buffer Lunch/AOT Trivia	Itzel Moya; KS Amy Boone; TX David Rose; TX Jeanine Schandel; WI
	Judges Luncheon (in private dining room)	Host: Hon. Elinore Stormer; OH
12:45 p.m.	Facilitated Discussions	
	<i>What Families Want Out of AOT (45 mins)</i>	Kathy Day; Treatment Advocacy Center Dr. Daniel Garza; NY Hon. Elinore Stormer; OH Leslie Carpenter; IA
	<i>Is it time to standardize AOT? (30 mins)</i>	Amy Lukes; Treatment Advocacy Center Dr. Daniel Garza; NY Hon. Oscar Kazen; TX
	<i>Weaving AOT into the Fabric of the Mental Health System of Care</i> Whose job is it anyway? (45 mins)	Lisa Dailey; Treatment Advocacy Center Brian Stettin; NY Mark Munetz; OH Mindy Greiling; MN Cindy Schwartz; FL
2:45 p.m.	Open Forum for Final Questions, Comments, Observations, Etc.	Sabah Muhammad; Treatment Advocacy Center
2:55 p.m.	Final Remarks Test Your Knowledge – Posttest	Lisa Dailey; Treatment Advocacy Center
3:00 p.m.	Adjourn	All

Revenue	Original Budget	Amended Budget	Prior Month	Current Month	YTD	% YTD
Property Tax Revenue/Fund Bal Xfr	\$ 8,998,237	\$ 6,403,304	\$ 673,140	\$ 1,191,945	\$ 7,438,965	116%
Regional Service Payment	\$ -	\$ 4,646,171	\$ -	\$ -	\$ 4,646,171	100%
Medicaid Reimbursement (TCM)	\$ 115,600	\$ 116,200	\$ 9,496	\$ 12,532	\$ 125,841	108%
I-START	\$ 362,325	\$ 8,000	\$ -	\$ -	\$ 8,000	100%
Misc. and Interest	\$ 62,800	\$ 66,800	\$ 18,521	\$ 16,490	\$ 103,549	155%
<b>Total Revenue</b>	<b>\$ 9,538,962</b>	<b>\$ 11,240,475</b>	<b>\$ 701,158</b>	<b>\$ 1,220,968</b>	<b>\$ 12,322,526</b>	<b>110%</b>

**Expenditure Domain**

<b>Core</b>						
Treatment	\$ 675,000	\$ 1,224,000	\$ 50,605	\$ 296,339	\$ 891,850	73%
Crisis Services	\$ 2,000,000	\$ 2,642,000	\$ 141,872	\$ 400,455	\$ 2,223,836	84%
Support for Community Living	\$ 2,002,000	\$ 2,502,000	\$ 114,728	\$ 489,164	\$ 1,909,914	76%
Support for Employment	\$ 350,000	\$ 350,000	\$ 21,773	\$ 25,226	\$ 259,804	74%
Recovery Services	\$ 30,000	\$ 30,000	\$ -	\$ -	\$ 439	1%
Service Coordination	\$ 3,500	\$ 7,000	\$ -	\$ 561	\$ 3,925	56%
Sub-acute Services	\$ 250,000	\$ 200,000	\$ 20,254	\$ 19,893	\$ 168,147	84%
Evidence Based Treatment	\$ 510,000	\$ 310,000	\$ 2,283	\$ 7,257	\$ 45,804	15%
Mandated	\$ 525,000	\$ 525,000	\$ 71,144	\$ 63,918	\$ 402,503	77%
<b>Additional Core</b>						
Justice System Involved Services	\$ 320,000	\$ 330,000	\$ 8,935	\$ 45,545	\$ 291,051	88%
Evidence Based Treatment	\$ 100,000	\$ 100,000	\$ 9,720	\$ 340	\$ 60,415	60%
Other Informational Services	\$ 270,000	\$ 270,000	\$ 415	\$ 4,888	\$ 178,785	66%
Essential Community Living Support Services	\$ 2,108,200	\$ 2,170,500	\$ 137,567	\$ 218,655	\$ 1,905,046	88%
Other Congregate Services	\$ 825,000	\$ 1,200,000	\$ 135,748	\$ 108,745	\$ 1,066,598	89%
Administration	\$ 1,310,000	\$ 1,310,000	\$ 74,490	\$ 75,919	\$ 1,100,027	84%
County Provided Case Mangement	\$ 115,600	\$ 116,200	\$ 7,355	\$ 11,511	\$ 116,735	100%
County Provided Services (I-START)	\$ 450,000	\$ 79,956	\$ -	\$ -	\$ 79,956	100%
<b>Total Expenditures</b>	<b>\$ 11,844,300</b>	<b>\$ 13,366,656</b>	<b>\$ 796,890</b>	<b>\$ 1,768,414</b>	<b>\$ 10,704,837</b>	<b>80%</b>

June Payroll/Benefits Breakdown:	
Gross Payroll	\$107,046
FICA (Employer)	\$7,773
IPERS (Employer)	\$10,105
Insurance (Employer)	\$31,979
<b>TOTAL</b>	<b>\$156,904</b>

Year-to-Date Per Capita Annualized Expenditure Rate: \$ 36.54

<b>Fund 8500 Health Reimbursement Account Fiscal YTD (6/30/2022)</b>	<b>Balance Fwd from prior FY</b>	\$ 162,347
	<b>Revenue</b>	
	Employer Contributions	\$ 402,311
	Employee Contributions	\$ 50,679
	Flex - Employee Contributions	\$ 12,815
		<b>\$ 465,805</b>
	<b>Expenditure</b>	
	Health Insurance Pmts (ISAC)	\$ 412,927
	Medical Claims Pmts (Auxiant)	\$ 44,524
	Flex Claims (Auxiant)	\$ 6,261
	<b>\$ 463,713</b>	
	<b>BALANCE</b>	<b>\$ 164,439</b>

Ending Checking Account Balance 6/30/22 (Funds 4150 and 8500) \$ 9,151,609

### County Social Services Exceptions to Policy and Reconsiderations - June 2022

Clients	Service	Decision	Impact
1	Support Services - Guardian/Conservator	Member is on the waiting list with Iowa's Department on Aging (IDA) Office of Public Guardian, #78 on the list.	\$150.00
2	Supported Community Living	Current waiver does not fund member's services, member is applying for a funding source that will fund the services needed.	\$3,633.00
3	Day Habilitation	Member's waiver does not fund day hab programming.	\$2,409.65
4	Basic Needs - Rent	Member is not stable enough to work. Member needs rental assistance until Social Security benefit is approved.	\$515.00
5	Basic Needs - Rent	Currently member does not have any income. Appealing Social Security Administration's disability decision with an attorney.	\$250.00
6	Basic Needs - Rent	Member is unable to live safely with housemates due to member's diagnoses. Member's team is looking for affordable housing.	\$604.00
7	Basic Needs - Rent	Member needs assistance with rent to avoid homelessness. Member is working part time and will be responsible for \$90 per month of member's rent cost.	\$185.00
8	Basic Needs - Rent	Member needs assistance with rent to avoid homelessness.	\$550.00
9	Basic Needs - Rent	Member is not stable enough to work. Member needs rental assistance until Social Security benefit is approved.	\$400.00

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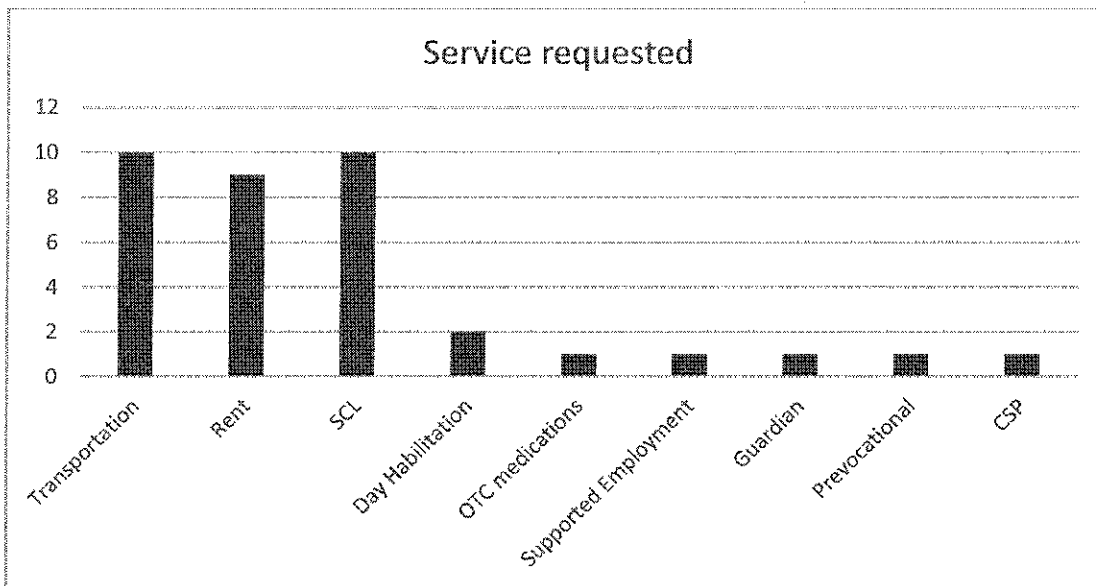
**Approximate monthly impact: \$ 8,696.65**



# FY2022 Annual ETP Report

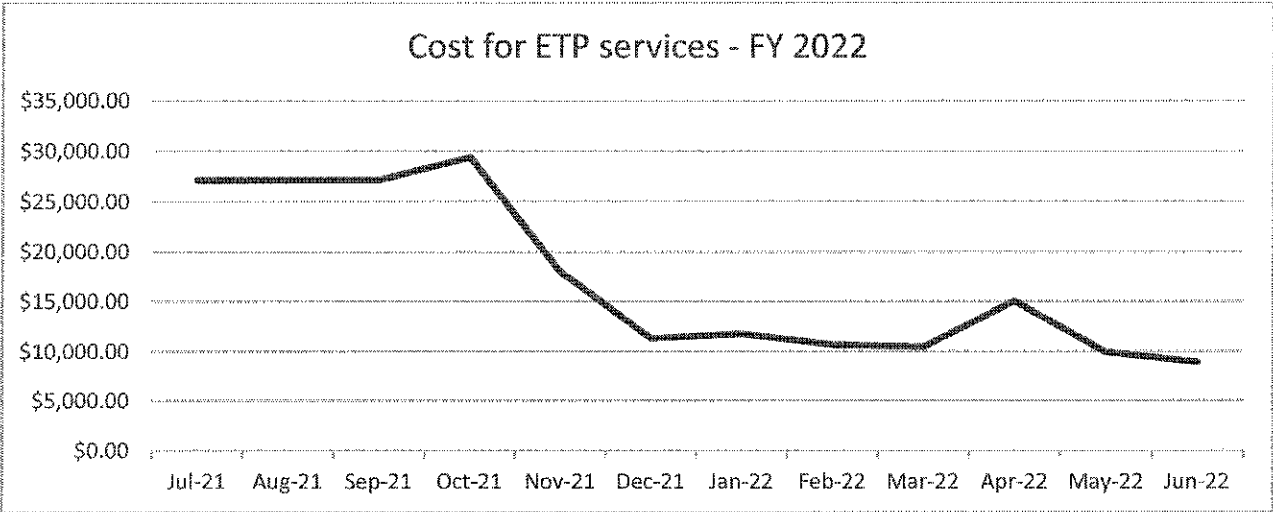
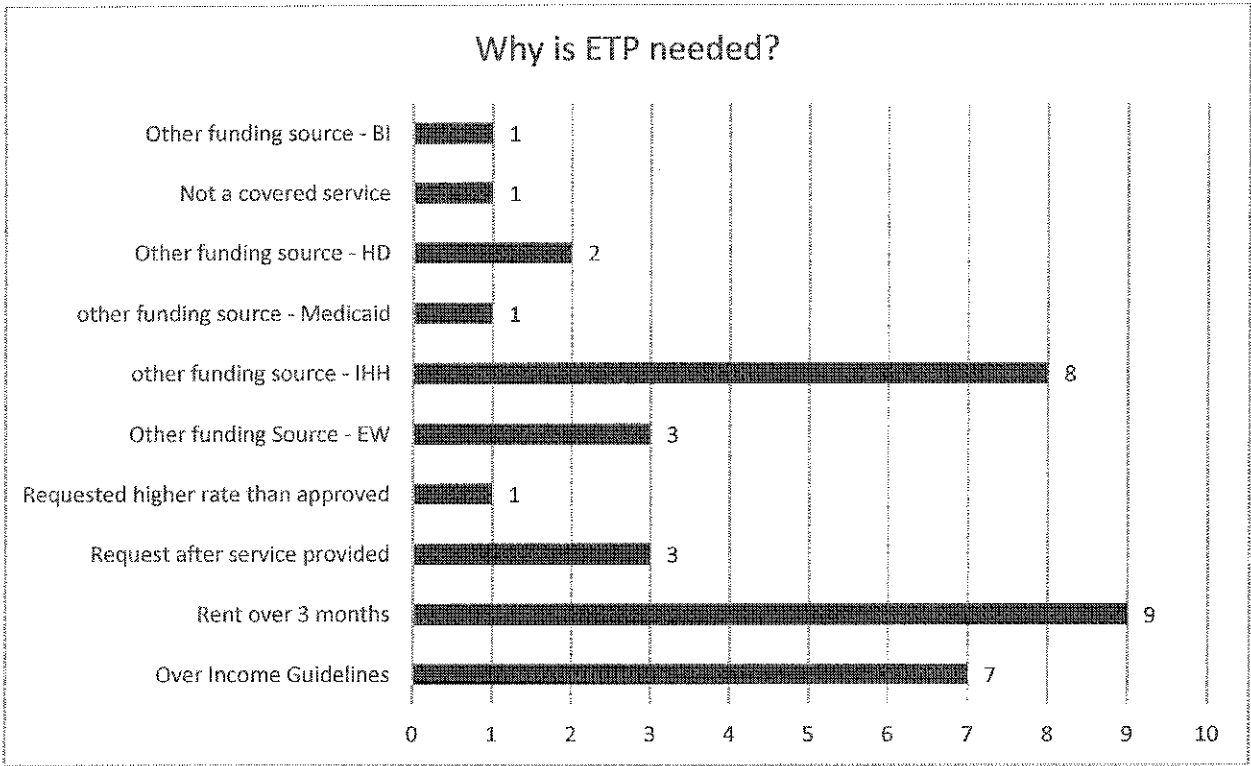
During FY22, there were 36 approved ETP requests. The yearly dollar impact for authorized ETP services was \$203,901. The following report shows what services were requested, why they were requested and the cost of the ETP's.

The graph below shows all the services that were requested in the ETP(s):

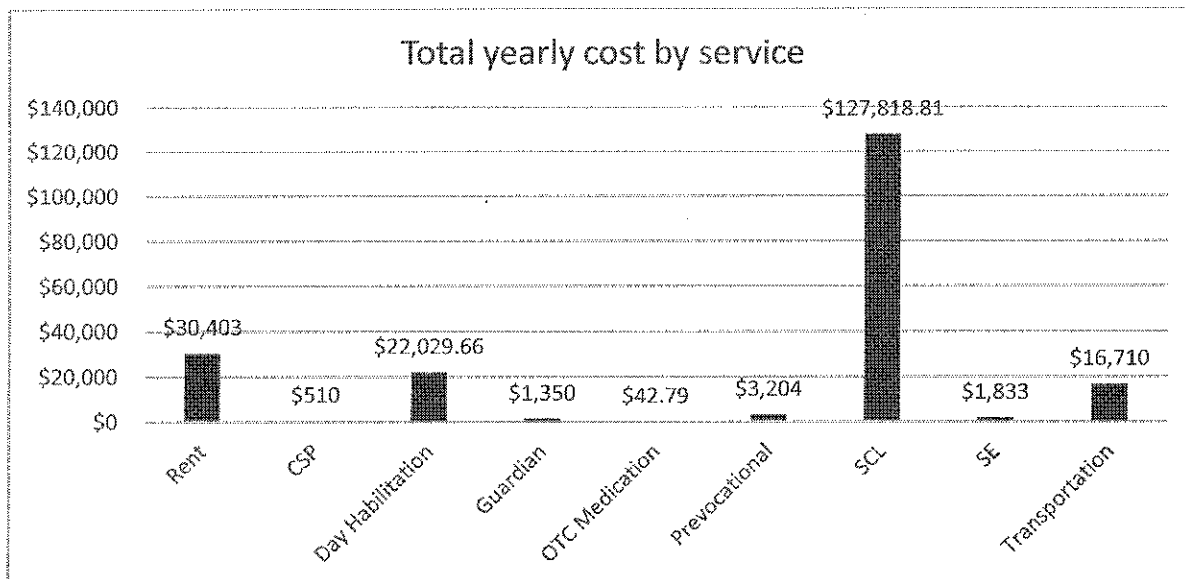


**\*Starting 2/1/2022, CSS stopped requiring an ETP for transportation.**





**Monthly ETP costs went from a monthly high of \$29,415 in October of 2021 to a low of \$8,935.95 in June of 22.**



**SCL is the most requested service & as the graph above shows, SCL is the service that the Region spends the most on for ETPs.**

### Denied ETP requests:

There were only 4 denials of ETP requests during FY2022. Two of the denials were for one person as they were requesting two ETP's during the same time period. Reasons for denials are as follows:

1. On Elderly Waiver & approved for Nursing Level of Care (2)
2. Over income guidelines (2)

### Data Summary

- **Transportation** was the highest requested ETP for the first six months of the fiscal year. At that time, CSS was requiring an ETP for persons on habilitation services to request an ETP for transportation to Day habilitation. It was decided to stop requiring the ETP because Habilitation does not cover transportation cost so there really was no other funder for that service.
- **Rent** In all cases, rent is for persons who have no or limited income and are waiting on Social Security determination.
- **SCL services** is by far the largest dollar amount for ETP's. Most of the SCL services were for funding for persons over income guidelines or who had other funding sources (such as the Elderly Waiver) but the SCL provider did not accept that type of funding.

- **Over income** was a significant number of ETP requests this fiscal year. This is due to a policy change in CSS. Prior to 7/1/2022, CSS accepted a higher level of resources. Starting 7/1/2022, CSS decided to match DHS's resource limits. Most of the over income ETP's were persons we served prior to 7/1/2022 who needed time to spend down resources. This number will more than likely be less in FY2023.

### **Areas to consider for FY 2023:**

1. The Rent policy is a good policy - even though we have several ETP's on it. ETP's requested provided the Region an opportunity to be aware of the cases and to review to ensure that other parts of the rent policy were being followed – such as applying for Section 8 & signed IAR. In many cases this was not being done. I would continue with this being an ETP.
2. SCL – we did have people request who were over income guidelines. For most of those cases, the ETP process allowed us to develop a plan for the individual to be able to fund for their services outside of the Region funding. We have not seen requests for person who are over income as much during the later part of the year as most people are aware of the new resource policy now. The individuals that had other funding sources (waiver) – we did or are in the process of working with the team on developing a plan for them to access funding through their LTSS funder. CSS has attempted to address this by implementing new processes for persons going into 24 hour care funded by the Region. We still do have a few individuals that we funded prior to them being eligible for waivers and we continue to fund them because their current provider does not take their new funding source. If there is a desire to reduce the cost of SCL services, we may want to look at not funding any new cases that have other funding sources. For instance, if someone has the Elderly Waiver and requests to enter a 24 hour group home funded by the Region, we would want to deny that and have their MCO be in charge of their services. All the ETP requests for SCL were outside of normal policy so I would also continue with ETP's for this.
3. Day habilitation – Requests were from persons on another funding source. If an individual has another funding source that should be explored first. Most of the LTSS funding sources would not fund Day Habilitation. Something to consider with Day Habilitation is if this service is necessary for persons in 24-hour care and/or if it is necessary to attend 5 days a week.
4. Transportation- although this is no longer being requested as an ETP as much since the change earlier this year, I would recommend looking at developing a transportation policy that defines reasonable assistance for transportation. At one time in FY22, we had a request for transportation for one month for at a cost of \$3920 for one person to attend work. CSS may want to set a dollar limit or a limit on number of rides if there is a desire to lower dollar amount spent on transportation.
5. The rest of the requests were all very specific to the individual requesting and showed no trends.