

# Olmstead Plan Stakeholder Advisory

## Quarterly Meeting Minutes

December 15, 2023

Holly Riddle called the meeting to order and introduced Community Co-Chair Betsy MacMichael. Ms. MacMichael commented on the National Caregiver Month and the passage of Medicaid expansion. She was followed by Deputy Secretary Farrington who observed that the Olmstead Plan touches on many facets of NC Department of Health and Human Services' (NCDHHS) work and many aspects of people's lives.

**Presentations by TAC and Mathematica.** The Technical Assistance Collaborative's (TAC) Sherry Lerch reviewed the implementation to date of the Calendar Year (CY) 2022 - 2023 Plan. She described a summary of results for the period July 2023 – September 2023. Particularly, she noted that 75 strategies were in process; 12 strategies had been discontinued; and four of the five strategies tied to the Tailored Plan were on hold, pending the “go live” date for the Tailored Plan. The fourth quarter report (October 2023 – December 2023) will come out in late January of 2024.

Marianna Gorbaty presented on behalf of Kent Davis of Mathematica. Ms. Gorbaty noted that progress measure review and alignment of measures with the Olmstead Plan strategies was well underway. Much work is occurring around data processing and measure calculation to inform the “measure-centric” dashboard that Mathematica's team is developing. [Staff note: The dashboard will be completed in June of 2024.] Mathematica plans to integrate the 31 “priority measures” adopted by NCDHHS into the new Olmstead Plan but will retain measures reported by NCDHHS' divisions in the quarterly reports developed by the TAC. Priority measures cover the intellectual and developmental disabilities population; competitive integrated employment; psychiatric residential treatment facilities for children; and certain foundational measures, for example, in the area of workforce. Mathematica will add measures for the justice-involved population, a new priority in the 2024 – 2025 Plan.

**OPSA Member Discussion.** An extended discussion took place regarding the interactions of consumers with Local Management Entity-Managed Care Organizations (LME/MCOs) and individualized case tracking. OPSA member Annette Smith expressed concern that LME/MCO data about families and individuals was subject to an encrypted erasure at 30 days, making it hard for people to check their own histories. Deputy Secretary Farrington observed that it was possible that this barrier might be superseded in the future, given the concern.

Talley Wells discussed the NC Council on Developmental Disabilities' interests in knowing more about Medicaid waiver budgets and tracking how many hours of service were provided to whom and at what cost. Ms. Gorbaty noted that Mathematica would collect data on all waivers and would consider how to compare institutional and community costs.

**Development of the 2024 – 2025 Olmstead Plan.** Sherry Lerch shifted the discussion to the proposed revisions to the 2024 - 2025 Olmstead Plan. The overarching goal of the updated Olmstead Plan will remain the same, for North Carolinians with disabilities to have the option to live as fully integrated members of their communities. The NCDHHS will assess progress towards this goal through the measures that Mathematica is developing.

Ms. Lerch noted that there were 11 priorities in the 2022 - 2023 plan. The TAC, she said, was refining that. The proposed, priority areas for the 2024 – 2025 Plan are:

- ✓ Increasing access to home and community-based services as alternative to institutional placements, through waivers and the 1915(i) amendment to the Medicaid state plan.
- ✓ Strengthening efforts to divert and transition people from settings that separate them from community.
- ✓ Addressing gaps in community-based services.
- ✓ Strengthening opportunities for individuals to explore and achieve competitive integrated employment.
- ✓ Reentry to the community of justice-involved people with disabilities.

These priorities will support:

- The direct support professional/direct services workforce crisis, with the goal of ensuring adequate numbers of workers with the competencies to support people who want to live or remain in the community.
- More actively engaging partners, including LME/MCOs, Area Authorities on Aging, and providers, at regional and local level.
- Promoting and providing more robust information about services so that people, including those with complex disabilities, know what is available and can make informed decisions.
- Addressing disparities in access to services, for example, access in rural versus urban areas.
- Addressing inadequate transportation as a barrier to community integration.
- Continuing to offer alternatives to overly restrictive guardianship to promote choice.
- Using data for evaluation and quality improvement.

Ms. Lerch observed that the NCDHHS will know plan implementation is successful when more people:

- Have ready access to the services and supports they want and need in the community.
- Can compete for and attain competitive integrated employment.
- Have more social connections.

The timeline for completion of this plan is Spring 2024. TAC will share a draft with the Department, then with the public for its review and comment. The Plan will be completed and released in late March. In the meantime, TAC will continue working with the NCDHHS to gather information on progress for the first quarter of 2024, issuing its summary report.

**Question and Answer.** Mathematica’s Kent Davis addressed a question from member Jessica Aguilar. She wondered if service utilization (hours approved versus hours tracked) would be measured across the waivers. Mr. Davis said that the initial focus would be on priority measures in the areas discussed. Over time, Mathematica will be able to “drill down” into the measures, addressing more gaps in services.

Ms. MacMichael asked how Mathematica would capture quality, access, and equity in service delivery. Mr. Davis noted that health equity is an issue of importance, and that the data was “in the pipeline” but is not yet a formal priority for measurement. Mathematica is initiating work with census data to assist the state in understanding who receives services, which will assist in assessing the issue of equity. In response to Ms. MacMichael’s question, Deputy Secretary Farrington said that additional data sets will become available under the Tailored Plans. She emphasized the importance of making measures visible and meaningful so that the public knows what is taking place.

OPSA member Jeff Holland discussed the barriers presented by the Direct Support Professional crisis and disparities in access to services. He asked, generally, how the OPSA members should offer ideas. Ms. Lerch and Ms. Riddle both emphasized the forum offered by these meetings.

Annette Smith asked if the Olmstead team would analyze “highly used” consumer policies across the LME/MCOs. She pointed to varying interpretations of, for example, policies related to transportation and Employer of Record (EOR). Providers, she said, interpret these policies in different ways. She urged that interpretations be consistent across the state. The NCDHHS’ assistant general counsel Pam Scott concurred.

**Public Comment.** - There were no additional comments.

**Closing.** Co-Chair Bryan Dooley closed the meeting. He thanked the OPSA for the “commitment of all to community.” To illustrate the importance of the *Olmstead* agenda, he described what had happened to him when he lost his mother, his primary caregiver. The wages his Direct Support Professional was paid, \$15/hour, forced that individual to find other employment. Mr. Dooley said that he had to stay with his grandparents until a new team could be assembled to support him in his own home. At first, he said, the loss of staff and the search for a replacement was “terrifying.” Happily, through supported employment, he was able to keep his job, but he experienced a variety of setbacks. Mr. Dooley urged that the OPSA continue its advocacy, which would allow many more people to “lead their best lives.” He closed by noting the continued struggles of those on the waiting list and thanked the NCDHHS and the OPSA for its progress on the Plan. He noted that there was still far to go before all North Carolinians with disabilities could benefit from the Olmstead Plan and its vision.

Ms. Lerch announced that this was her last meeting with the OPSA, as she is retiring. The TAC’s staff, however, will continue to support North Carolina’s work. Both Ms. Riddle and Ms. Scott thanked her on behalf of the NCDHHS and the OPSA.

The meeting was adjourned.