PSYCHIATRIC ADVANCE DIRECTIVES USING SUPPORTIVE DECISION MAKING

INNOVATION PLAN ANNUAL UPDATE FY 2019-2020.



Innovation Plan Annual Update
Psychiatric Advance Directives Using Supportive Decision Making

Intro

The following is a summary brief for the first year of the Fresno County Department of Behavioral Health (DBH) Innovation Plan-Psychiatric Advance Directives Using Supportive Decision Making. The Fresno County Department of Behavioral Health (DBH) is the first county to join the Psychiatric Advance Directive (PAD) using Supportive Decision Making (SDM) project sponsored by the Mental Health Services Oversight and Accountability Commission (MHSOAC). Fresno County's Plan to join the MHSOAC sponsored project was approved by the MHSOAC on June 24, 2019.

Fresno County held informational calls with the Saks Institute of University of Southern California, the Texas RioGrande Legal Aid and the Burton Blatt Institute of Syracuse University to understand the project as part of its project development and submission of an INN plan to the Commission in June of 2019.

Fresno County had three Innovation Plans approved at once during June of 2019 and thus was in the process of managing and moving all those projects forward. The DBH staff began early work reviewing literature related to PADs and Supportive Decision Making as well as determining interest and communicating with other counties who may have sought to participate the statewide project. As such, Fresno County did not wish to progress too quickly and end up too far ahead in the project, which could make a coordinated statewide effort more difficult to implement.

Initial Steps

Fresno County coordinated an in-person meeting with the members of the MHSOAC, Saks Institute, Texas RioGrande Legal Aid, the Blatt Institute, and a number of Mental Health Services Act (MHSA) Coordinators following a regularly schedule MHSA Coordinators in-person meeting in Sacramento on October 23, 2019. During this meeting the PAD team (Saks, Texas RioGrande Legal Aid, and Blatt) shared information about PADs and their application in mental health care coordination. The team also shared the use of supportive decision making and the transformative natures of PADs. This forum-style meeting allowed interested counties to explore the topic and to elicit responses from the PAD team that could help inform the other counties about the project and their possible participation. Orange County, Modoc County and Monterey County all expressed interest in learning more about the project.

Fresno County DBH held teleconferences with the PAD team to plan next steps. An in-person meeting was slated for February 2020, in Fresno. Fresno extended an invitation for this meeting to other interested counties.

Several other calls and meetings occurred between December and the February in-person kickoff meeting. Fresno County hosted the PAD team on February 25, where representative from Modoc County attended in person, and Orange listened in.

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The Plan

Several members of the Fresno County DBH Leadership team, including leadership and supervisors from the Adult and Children's System of Care, participated in the kick-off meeting. The extensive experience in the room allowed for a robust discussion about target populations, potential learning goals, implementation processes within the existing system, training related to PAD and supportive decision making, and available local partnership/resources.



The lively and interactive discussion increased understanding of the subject and for learning. options The interactions yielded three initial populations for target consideration in the project for Fresno County.

Figure 1: Members of Fresno County, Modoc County, Texas RioGrande Legal Aid, the Saks Institute and Blass Institute, Feb 2020

Fresno County's team will seek to develop a learning project using PAD and SDM with three target populations.

Homeless Adult Individuals

Fresno County would like to explore developing PADs with local homeless adults who access resources through one of the county's current MHSA programs: the Multi-Agency Access Program (MAP Point). The project will explore collaboration with local legal resources (possibly the Central California Legal Services or the San Joaquin College of Law) to develop PADs for individuals experiencing homelessness with the intent to measure if the development and obtaining of a PAD may be an effective strategy for engagement with a population that may not be in care, or has limited participation in services.

Adults on LPS Conservatorships

The Fresno Plan will seek to develop and implement trainings for providers/first responders in order to increase knowledge and understanding of PADs, increase the use of PADS, and increase an individual's ability to assist persons-served with obtaining a PAD.

Secondly, the project will seek to develop a PAD using SDM with individuals who are Conserved, or at-risk of being conserved (persons who have previously been conserved). The project would then seek to measure if and how the PAD is used in time of crisis; what

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role does a PAD play in reduction of hospitalizations and/or justice involvement; and whether first responders (Crisis Intervention Teams, Crisis Workers, Emergency Departments) are able to access and adhere to the PAD.

Youth Aging out of the Foster Care System

The third population that Fresno County will seek to include in the PAD project are transition aged youth (TAY) who are currently in the foster care system and are slated to age out of care (at 18yrs of age). Traditionally, the Fresno County system of care has experienced difficulty in engaging and retaining members of the TAY population. As former foster youth transition into adulthood, some of the first actions of independence they exercise is the ability to make their own decisions Oftentimes, youth might decide to no longer participate in behavioral health services that they deemed were forced as part of their involvement in the foster system. Fresno County seeks to explore how having a PAD may change the target population's engagement or retention in care. Does having a legal document that explicitly outlines one's wishes assist an individual to feel empowered, and thus participate in care? Furthermore, does having a PAD reduce instances of crisis, hospitalization or justice involvement. Finally, is the PAD accessible and honored by various organizations across the system of care.

Fresno County understands that this extensive system change will require a strong foundation of interagency knowledge and collaboration. Thus, in addition to providing services, the project will address some foundational work which will include training on completion of a PDA, understand of SDM and similarities to Wellness Recovery Action Plans (WRAP), and how WRAP can be used as supportive decision making. Finally work will need to be performed with local resources, community partners, and stakeholders to implement PADs in Fresno County. Additional support may be needed for the logistics of implementation, and will be explored as part of this process.

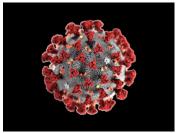
COVID 19-

The rapid emergence of the COVID-19 Global Pandemic came just a month after Fresno County and the PAD team had met to identify populations and some key targets for this project. The subsequent emergency orders and response reduced Fresno County's ability to move forward with planning and program development in any meaningful way. As a result of COVID 19, close to two-and-a-half months of planning were postponed. Fresno County has started to resume examination of its capacity for moving the project forward, through internal discussions and exploration of the department's resources to engage the three identified populations. DBH Leadership has also discussed whether the project scope should be narrowed, what resources are needed to support this project, and what would be reasonable timelines for resuming work around the PAD.

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Next Steps

Fresno County is seeking to work with Laurie Hallmark of the Texas RioGrande Legal Aid to become a paid consultant for Fresno County. Ms. Hallmark will assume the duty of project lead for Fresno County. One of the challenges for Fresno County is current capacity to coordinate the internal assets and efforts to support the larger project. Ms. Hallmark's expertise and experience can assist Fresno



County in planning the phases, identifying needed resources, and identifying roles and responsibilities for the project and phases for Fresno County. Fresno County intends to establish an agreement for technical assistance and consultation with Ms. Hallmark early in Fiscal Year (FY) 2020-21. This will allow the department to continue work on the three target populations and the broader statewide project.

Fresno County will then work to develop a Scope of Work for the overall project with the Saks Institute and Blatt Institute which can be developed for a service agreement for the broader coordination of the statewide effort, technical assistance, evaluation, and other functions for the project. It is the desire of Fresno County to develop the Scope of Work for this project early in FY 2020-21.

Fresno County is seeking to develop a SOW in conjunction with the PAD team, and to employ the assistance of the California Mental Health Services Authority (CalMHSA) in creation of an agreement allowing for multiple counites to work with the PAD team should it be needed. Fresno County seeks to contract with CalMHSA, which would then contract with all the PAD members and any other counites, thereby expediting the contracting process for all participants in the statewide project.

Request for extension.

To date, Fresno County DBH has expended only \$2,042.22 of the approved \$950,000 over three years. Fresno County first began to expend project funds in November 2019. To date, nearly all the funds expended has been spent on staff time. All but \$28.05 of the cost has been in salaries. The program's three-year clock began with the expenditures of those initial funds. Thus, the clock on this project started in November 2019. Currently Fresno has just over two years to conduct this project including the development of a scope of work and contracts, as well as the application of PAD for three populations, Fresno County's ability to continue work on the project came to an abrupt halt in March as the impacts of COVID 19 began, and soon the emergency orders related to COVID shifted the Department's priority to COVID response. COVID -19 also changed the method of service delivery for many programs which would curtail some of the project's efforts around training, logistics, and formalizing partnerships. For example, limitation of in person contract, being able to facilitate training for individuals served, and limiting of public

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engagement events would prevent some projects from being implemented as initially conceived in planning meetings.

The goals for this project are robust, and each population-focused phase will require time to implement. Currently Fresno County would have a little over two years left to complete the project and is still designing the scope of work and project plan for this effort. Fresno County does not wish to expend over \$947,000 in the next two years but would rather complete extensive project planning to ensure meaningful and responsible planning and spending to support the goals of the project.

Thus, Fresno County is proposing the following to the MHSOAC for approval:

- Fresno County is seeking a two-year extension for this project, thus making it a
 five-year versus a three-year project. The additional time will allow for completion
 of the necessary project planning, the actual implementation of the PAD for the
 various populations, and the training, development and logistics for the projects.
 The extension will provide the county with a little over four years for completion
 of the project vs just two.
- Fresno County will move forward with planning and work to develop contingencies for the project in light of COVID-19 so the project can work within the current COVID-19 parameters.
- Fresno County will work diligently with two-year extension to establish proposed service agreements with Laure Hallmark of the Texas RioGrande Legal Aid to assist in developing project plan for Fresno.
- Fresno County will work with the PAD team and other participating counties to develop a Scope of Work. Fresno will work with Orange County to identify if there is a need for a joint agreement or if it will be best for each of the counties to develop their own service agreements.

Budget

Project Budget	\$950,000
Year One Expenditures FY 2019-2020	\$2,042.22
Total Remaining Balance	\$947,955.78

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Appendix

Project Extension Letter



County of Fresno

DEPARTMENT OF BEHAVIORAL HEALTH

DAWAN UTECHT

DIRECTOR

July 17, 2020

Toby Ewing, PhD Executive Director Mental Health Oversight and Accountability Commission 1325 J Street, Suite 1700 Sacramento, CA 95814

Re: Request Innovation Plan Extension

Dear Director Ewing,

Fresno County Department of Behavioral Health is seeking approval for a two-year extension to its current Psychiatric Advance Directive (PAD) using Supportive Decision Making (SDM). The PAD is one of Fresno County's approved innovation programs, which is part of a larger Mental Health Services and Oversight Accountability Commission (MHSOAC) sponsored statewide project. This request will change the project from a three-year plan to a five-year plan but will not change the total approved project budget.

Fresno County began to expend funds related to the project in November 2019. The funding was related primarily to staff time for the planning of the project, including several phone and in-person meetings.

To date Fresno County has expended only a total of \$2,042.22 of the approved \$950,000 budget. All but \$28.05 of the \$2,042.22 expended has been for salaries. The program's three-year clock began with the expenditures of those initial funds. Thus, the clock on this project started in November 2019. Currently Fresno has just over two years to conduct this project, including the development of a scope of work and contracts, as well as the application of PAD for three populations. Fresno is seeking a two-year extension to allow for the project to be conducted and completed over five years versus three years, which would allow for effective project planning, implementation, and assessment.

Fresno County's ability to continue work on the project came to an abrupt halt in March as the impacts of COVID-19 began and the emergency orders related to COVID shifted the Department's priority to COVID response. COVID -19 also changed the method of service delivery for many programs which would curtail some of the project's efforts around training, logistics, formalizing partnerships, etc. For example, limitation of in person contract, being able to facilitate training for individuals served, and the limiting of public engagement events, would prevent some projects from being implemented as initially conceived in planning meetings.

The goals for this project are robust, and each population-focused phase will require time to implement. Currently Fresno County would have a little over two years left to complete the project and is still designing the scope of work and project plan for this effort. Fresno County does not wish to expend over

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\$947,000 in the next two years, but would rather complete extensive project planning to ensure meaningful and responsible planning and spending to support the goals of the project.

Thus, Fresno County is proposing the following to the MHSOAC for approval:

- To allow the program a two-year extension which would have the project complete on November 11, 2024. The change would permit Fresno County to have a full five years for the program/projects versus working with approximately two years to implement the core of the project over three years. COVID-19 caused significant disruption in the planning and development of the project and the three planned populations.
- Fresno County will work diligently to establish the proposed service agreements with Laurie Hallmark to assist in developing a project plan for Fresno.
- Fresno County will work with the Saks Institute and Blatt Institute (PAD team) to develop a
 Scope of Work to be included in an agreement with CalMHSA on behalf of Fresno County (and
 allowing for other counties to join the project through CalMHSA).

Thank you for your time and consideration for Fresno's extension request for the PAD Innovation plan. Should you have any questions please contact me at either abahrami@fresnocountyca.gov or (559) 600-6865 for we may be of additional assistance.

Respectfully Yours,

Ahmad Bahrami

Division Manager-Public Behavioral Health
Fresno County Department of Behavioral Health

Cc: Dawan Utecht, Director Fresno County Behavioral Health

Erinn Reinbolt, MHSA Coordinator-Fresno County Department of Behavioral Health

Tami DeFehr, MHSA Fiscal Analyst- Fresno County Department of Behavioral Health

Psychiatric Advance Directive Project File