

Planning and Monitoring Committee Meeting

Meeting date: Monday, January 6, 2019

Meeting time: 5:06pm – 7:13pm

Meeting location: Conference room, 2 Oak Street

Recorder: Ashley Morrow

Committee Members Present:

X	Steve Barnes, Committee Chair		Rob Duncan-absent
X	Ken Murray		Mike White-excused
X	Julie Landoll		Ben Chaffee, Jr.-excused
X	Katie Chieda		

Board Staff Present:

X	Kristen Cardone, Executive Director	X	Ashley Morrow, Administrative Assistant
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Unfinished business/updates:

- Presentation for January: Willard Community Connectors
 - Ms. Cardone shared with committee members that the Willard Community Connectors will be presenting at the January 14th Board Meeting.
- Open Board seat
 - Ms. Cardone informed committee members that Ms. Wheeler has resigned from her Board position effective immediately which will make 2 Board seats available. She shared that one person has already applied for a Board seat and that application will be sent to the state for approval. She added that she would like committee members to think of anyone they feel would be a good addition to the Board.
- Strategic Plan update
 - Ms. Cardone passed out a copy of the Board's strategic plan and highlighted some of the goals that have already been accomplished. She said that she will be sharing updates on the strategic plan at the Board's monthly meetings to ensure the Board is on track with accomplishing its set goals and objectives.
 - Ms. Cardone also shared that she has a call with OHMAS to discuss creating a Trauma Informed Community. She stated that this will require a shift in the culture, a change in thinking from "what is wrong with you" to "what happened to you". This focus will help prevention efforts, reduce stigma, and increase awareness on ACE's (Adverse Childhood Experiences).
- Board meeting location
 - Ms. Cardone shared that due to the delay in construction and the current lack of space at the new office location, Board meetings will be held in the Grist Room at Fisher Titus Medical Center.

Discussion Items:

- Office Space updates
 - Ms. Cardone updated committee members on what has currently been done at the new office location. She informed members that the mold has been removed, the vents have been fixed, the carpets have been cleaned, the locks have been changed, new wiring has been installed for phone

and internet services, the front entrances and offices have been painted, a new logo has been placed on the wall by the entrance, and new outside signs have been ordered from Foghorn. She added that construction has been delayed due to the fact that all renovations done must be approved by the state so the Board had to have an architect create plans for the renovations. She said everything has been done and she is waiting on a response from the architect on steps to move forward.

- Ms. Cardone also shared that she has contacted Heather Horowitz to schedule a walkthrough of the old office space to ensure there are no concerns or issues that need to be addressed. She added that NEDC has agreed to purchase back the desk that the Board originally purchased for the office space.
- Peer Support RFP (possible action item for Implementation, summaries in Attachment I)
 - Ms. Cardone reviewed the RFP summaries with committee members.
 - Family Life Counseling submitted an RFP for peer support. There was conversation regarding their ability to bill Medicaid as a benefit however, they are a treatment agency and there was concern on how well they would be able to collaborate with other treatment agencies in regards to the different paperwork that is required to be completed at each agency.
 - Questions regarding the proposal:
 - Do they plan on serving clients from other treatment agencies?
 - Will clients be required to complete a diagnostic assessment?
 - Do they plan to transport clients?
 - Will they pursue opening a peer center and offer support groups?
 - Additional information is requested regarding their DA process.
 - Let's Get Real submitted an RFP for peer support. There was discussion on how Let's Get Real helped ALERT begin services in Huron County. The feedback on their proposal was it "aligned with the services requested, met the needs, and was detailed".
 - Questions regarding the proposal:
 - Will the \$48,000 in funding for CPRS go away once the organization is able to bill Medicaid?
 - What are their plans for the future regarding oversight and operations of the program? Do they plan to hand off the program to individuals named in the proposal? If so, what does that handoff look like?
 - Is the funding request for a whole fiscal year or just the remainder of FY20?
 - The request seems low to include a peer center, explanation of the budget in greater detail is wanted.
 - The Sandusky Artisans submitted an RFP for peer support. There was discussion surrounding the fact that the Artisans have been providing peer services and operating a community center for a long period of time in Sandusky. It was said that they do very good things in their community and they have a good reputation. The committee members however felt their responses in their proposal were vague and lacked detail on their plan.
 - Questions regarding the proposal:
 - What is the specific implementation of the plan?
 - What is the anticipated timeline?
 - How many peer supporters do they plan on having from Huron County?
 - What support groups will they offer?
 - Do they plan on working with any of the current ALERT peer supporters?
 - Oriana House submitted an RFP for peer support. It was agreed that Oriana House submitted a very good and detailed proposal, however committee members felt the dollar amount that they

were asking for was much too high, especially when, as a treatment agency, they are able to bill Medicaid for the services.

- Questions regarding the proposal:
 - Would they also be providing mental health peer support?
 - Does the line item funding for salaries & wages and fringe benefits go away once staff is onboarded and able to bill Medicaid?
 - What are the hourly rates for Recovery Coaches and Clinical Coordinator?
 - What groups would be offered?
 - Do they plan on working with any of the current ALERT peer supporters?
 - How would transportation work for peer services with one van?
- After discussion among the committee members, it was decided to invite Family Life Counseling and Let's Get Real to the January 14th Board meeting to present and answer the questions they had. Ms. Cardone will reach out to both organizations and invite them to next week's meeting.
- Huron County Commissioners Complaint
 - Ms. Chieda shared with committee members that she has discussed the complaint received from Mr. Michael Pack with the Board's legal representative, Mr. Randall Strickler. She stated the steps forward are to contact the 4 individuals named in the complaint and to follow up with the Board with the information gathered. It was suggested the Ms. Chieda also schedule a meeting with Mr. Pack and Mr. Strickler to address the allegations.
 - The committee members reviewed the complaint as well as the document created with Ms. Cardone's responses, as found in Attachment II.
 - The committee suggested looking further into the receipts Mr. Pack stated he submitted to FTMC for payment for ALERT expenses so that they can ensure he has been reimbursed for his services.
 - Ms. Cardone stated that she will be working on putting together a grievance policy for situations such as this complaint. Currently the Board has a grievance policy for clients of treatment agencies and for internal issues concerning Board staff, however there is not a procedure in place for how to handle a complaint against Board staff. Ms. Cardone will reach out to other Boards and present a policy for review and discussion at February's Board meeting.
 - It was suggested by committee members to invite Mr. Randal Strickler to attend the January 14th Board meeting.

Attachment I: Peer Support RFP Summaries

- 1. Organization: Family Life Counseling**
- 2. Plan:**

Describe proposed model for taking over ALERT program:

FLCPS will, as soon as possible, meet with current ALERT staff and begin to construct and implement a transition plan. FLCPS will also meet with law enforcement leadership to establish an effective collaborative process for the continuation of ALERT services. This will also offer an opportunity to address any immediate improvements that they would recommend. It is FLCPS's intention to adopt the current procedures including the utilization of the ALERT Hotline. In addition FLCPS will continue embedded services in local jail facilities. The key during the transition period is to omit any disruption of services. FLCPS also is committed to interview all current ALERT program staff to enquire of their interest in continuing on with the program and to determine if they are a good fit moving forward. If FLCPS is given the privilege all appropriate peer support services for Medicaid eligible clients will be billed to Medicaid.

Plan for expanding peer support services throughout the county:

The plan for expansion will include meeting with law enforcement and other community leaders across Huron County that does not have an ALERT program operational and present the model to them. If they are willing then we will begin to recruit and train competent ALERT staff from or near that community to serve that community. FLCPS have been able to establish a decentralized infrastructure to support and supervise services in other communities. The utilization of encrypted programs like Zoom will enable ALERT staff in those more rural settings to stay connected to needed support and supervision. The infrastructure will expand as the ALERT program grows across the county to assure adequate oversight and quality assurance. Decisions on what communities are targeted first will be determined in conjunction with input from the Huron County Mental Health and Addiction Services Board and statistics concerning community need. The overarching goal will be to have an operational ALERT program across the entire county. A robust training program will be established to expand and enhance program effectiveness.

- 3. Number of proposed staff/staffing plan for HC:**

FLCPS is willing to maintain and hire current ALERT program staff if they meet certification qualifications and they wish to continue with the program. FLCPS is committed to recruit and maintain sufficient staff to meet community need. It is our intension to hire permanent full time/part time staff as we seek to fully incorporate Peer Support Services into FLCPS continuum of care.

- 4. Collaboration with local agencies:**

Family Life Counseling and Psychiatric Services (FLCPS) highly values colaberation with other social service organizations. FLCPS is active memmer of the Huron County Children and Family First Committee, Suicide Prevention Committee and the Quick Response Team which is organized to meet with individuals that overdose on drugs. Recently FLCPS begun a colaberation with Huron County Children Services to iniate the Children's Mobile Response & Stabilization Services program.

- 5. Timeline:**

The implementation plan will consist of two phases:

Phase One: February 2020 – The transition plan will begin to assure that there is no gap or interruption of services. This phase will take 30 to 60 days.

Phase Two: March 2020 – The expansion plan will begin to implement ALERT across the entire county. A list of communities will be constructed with the assistance of HCMHASB to develop a prioritized list and the implementation process will begin. Dr. Steven Burggraf will assist the team with this important effort. Phase Two will continue until all identified and willing Huron County communities have an operational and effective ALERT program.

6. Experience:

FLCPS facilitates a Peer Support service program as a part of a collaborative effort with the Richland County Children Services as a part of the START program. We are moving into our second year of being a part of that important program. Family Life Counseling and Psychiatric Services (FLCPS) has been operating in multiple communities across North Central Ohio for twenty years.

7. Medicaid and financial stability plan:

FLCPS is able to bill Medicaid for Peer Support Services and therefore all community and office based services for Medicaid eligible clients will have a funding source. The HCMHASB has offered ongoing financial support for jail based services which are not able to be billed to Medicaid.

8. Mental Health? Not specifically addressed

9. Transportation? Not addressed

10. Peer Center? Not addressed

11. Financial request: \$10,417

12. Feedback:

- a. Does not address if FLC plans to serve clients from other treatment agencies (Oriana, Firelands)
- b. Does not mention if they plan to transport, have peer center, or serve mental health clients with peer support

13. Questions:

- a. Do you plan to serve clients of other treatment agencies?
- b. Will clients be required to complete a diagnostic assessment?
- c. Do you plan to transport clients? Offer/run support groups? Have peer run community center?

1. Organization: Let's Get Real

2. Plan:

It is our goal to work with and enhance the current ALERT program. We appreciate all the hard work that has gone into building the program and the relationships that have been made. The first step will be to meet with the ALERT peers to get to know them better, their availability, and goals in working with the ALERT program. That will provide us with a better picture of the current capacity as we work to expand programs.

We have already talked to two trainers about offering a peer support training in Huron County for Huron County residents seeking CPRS certification, and the expense of this training is not reflected in the proposed budget because it will not be at the expense of Huron County Board of Mental Health and Addiction Services. Our next step will be to work towards setting up a training and finding candidates that are interested in going through the training and pass our currently successful vetting process. When we find people interested, we work with them to help through the certification process, which can be arduous.

We would also reach out to the appropriate contacts within the police departments, hospitals, and Huron County organizations that we will be working with moving forward. This will provide us with a better picture of the overall need and potential within Huron County. This will also provide better insight into training and addiction education that may be needed. We have found in Lorain County that law enforcement and medical staff have a desire to help, but they do not know what they can do.

Once we get started and feel the WHO project with Fisher Titus Medical Center is running seamlessly, we will reach out to Mercy in Willard to discuss an expansion of the program into their emergency department. We have close ties with the director of emergency services in Mercy Regional Medical Center Lorain and hope that we can use our already established relationships to expand programs in Huron County.

Opening and staffing the peer support center would be a top priority and happen simultaneously to getting acquainted with the ALERT projects and peers. With Drew Riley's assistance, we already have leads on donated office equipment and furniture to reduce initial expenses and expedite the launch of the new center. Once the peer support center is up and running, we will reach out to local media to get some coverage on the ALERT program and what is available to residents in need. In Lorain County, we have found this to be an effective way to publicize our services. We will also work on reaching out to local churches and nonprofits with information on services.

Our goal is not to take over the existing projects but to leave ALERT under the LGR umbrella, utilizing our vast knowledge and experience in peer support services to complement and enhance the existing ALERT project.

We would like to continue our goal of filling the gaps in recovery support services with our groups in Huron County. All of our support groups are peer-to-peer and run by volunteer facilitators. We offer SMART Recovery, Adult children of Alcoholics, Life Recovery Bible, a family and children's group, and a grief support group for those who have lost someone to addiction.

3. Number of proposed staff/staffing plan for HC:

Our intent is to utilize the existing peer supporters in ALERT and from Huron County. We have the capacity to provide "overflow" support with our existing peer supporters. Our goal is to keep that peer supporters for ALERT/WHO local Huron County natives. Discussion has already been done to perform an additional peer support training and get more Huron County locals certified. As several peer support trainers are also affiliated with Let's Get Real, Inc and have already committed to a training.

4. Collaboration with local agencies:

Utilizing a client-centered approach, we intend to solidify existing relationships with Family Life Counseling, Firelands, Oriana House, and House of Hope Men's Sober Living of Willard. If selected, we would start by reaching out to each police department to review the project procedures and to talk to them about the needs of the county as they see it through the lens of law enforcement. We will also reach out to the Director of the Emergency Department at Fischer-Titus, as well as the heads of nursing and social work for the emergency

department, as we have found the people in those positions to be strong advocates for what we are trying to accomplish.

5. Timeline:

Steps laid out but specifics regarding when are not clear.

6. Experience:

LGR opened as a Recovery Community Organization (RCO) in August 2013. In 2013, LGR started offering peer recovery support services, matching a specially trained individual with long-term sobriety with someone just beginning the recovery journey. The Alcohol and Drug Addiction Services (ADAS) Board of Lorain County retained LGR to provide peer recovery support services as part of a number of special projects.

7. Medicaid and financial stability plan:

We currently bill through the Mental Health and Addiction Services Board of Lorain County, Erie County Detoxification, and Firelands Counseling and Recovery Services. We already have in existence a secondary bank account that we will utilize for the ALERT projects to maintain transparency. Additionally, our intent is to have all Huron County peer supporters paid through ADP payroll system to minimize mistakes and provide the board with the transparency they deserve.

Although we cannot currently bill Medicaid directly for peer support services, we are working towards that goal. All of our peer supporters have gone through the process of attaining an NPI number, so they are certified to be billed under Medicaid. We have had meetings with representatives from CareSource and Buckeye, and have consulted with other organizations within the treatment community on the process. We have reached out to and are working with a consultant that specializes in helping organizations navigate the Medicaid billing process. With the help of the consultant, we are estimating by April we will be able to bill under Medicaid for some peer support services.

As we become established in Huron County, we can further explore grant opportunities and fundraising efforts to help fund the ALERT program. We will continue in the process of becoming Medicaid certified, so we can bill directly for peer support services as allowable.

We are confident we will receive donations of furniture and equipment for the peer support center. We have approached a new private foundation opening in January 2020 and have a verbal commitment of \$10,000 to go towards Huron County recovery support services. In addition to private foundation grants, with the assistance of Ohio Citizens Advocates for Addiction Recovery, we monitor the availability of new state and federal grants.

Although not mandatory, we have an independent auditor that conducts an annual audit. As a board-run 501c3, there is a clear checks and balance system. We are reviewed and audited by our board on a monthly basis. CPA services are provided by Park and Illenberger, CPAs of Lorain, and we also employ an additional certified public accountant that reviews our billing processes, accounts payable and receivables on a monthly basis. Annual reports, tax statements, and additional documentation can be supplied upon your request.

8. Mental Health? Yes

9. Transportation? Yes

10. Peer Center?

Opening and staffing the peer support center would be a top priority and happen simultaneously to getting acquainted with the ALERT projects and peers. With Drew Riley's assistance, we already have leads on donated office equipment and furniture to reduce initial expenses and expedite the launch of the new center.

11. Financial request: \$85,700

12. Feedback:

- a. Multiple impressive letters of recommendation were provided
- b. Steps for timeline are clear but actual dates are not
- c. Services are very similar to what currently offer, just expanded

13. Questions:

- a. Will the \$48,000 for CPRS go away once able to bill Medicaid?
- b. Anticipated funding request annually once able to bill Medicaid?

1. Organization: Oriana House

2. Plan:

The overall concept for continuing and expanding peer support services in Huron County is multifold. The main tenants are as follows:

- ALERT program will be maintained as currently in practice, including having individuals go to the local hospital or Sheriff's Department and be connected to services. The accepting agency (hospital or Huron County Sheriff's Department) will call the volunteer on call, who will wait with the client until a Recovery Coach is able to meet with the client will arrange and transport to detox. From there, the Coach will continue to be in contact with the detox agency to provide a warm handoff to the identified local agency for continued services. This may include a residential referral or to outpatient services at any provider in the client's community.
 - Goal to improve volunteer outreach and involvement
 - Goal to provide promotional materials to local AA/NA meetings and sponsors to increase awareness of program
- QRT program will be maintained as currently in place with a Recovery Coach attending house visits to individuals and/or their families following an overdose incident.
 - Goal to provide meetings within the next business day or as scheduling with the Police Department and EMS allows
- Recovery Groups in the Huron County Jail will be maintained, allowing for at least two groups to be completed each week (one for males and one for females).
 - Goal for all clients to be able to access this resource while incarcerated
 - Goal to provide education of resources available in the community post-release, including self-referring to Recovery Coach services
- Individual Recovery Coach Services will begin, which will allow any area entity (behavioral health provider, hospital, court system, etc.) to refer a client for services and for that client to be able to receive individual coaching. Individuals will also be able to self-refer for services.
 - Goal for clients initiating contact to create a Wellness Plan that highlights personal goals in recovery
 - Clients can be seen at the coffee house (with expanded funding) or in the community for sessions
- With expanded funding, open a "coffee house" that all clients engaged in Coaching are welcome to access and take advantage of classes which will create a safe, sober place for clients to be able to become comfortable with a recovery community
 - Goal of creating a safe and welcoming place. Ideally, this would be located in the basement of the new MHAS location for ease of access

Continue to operate the ALERT program and participate in QRT. Oriana House is a part of the Summit County Quick Response Team (QRT). This program is similar to Huron County's QRT in that a license clinician, police, and EMS respond by meeting with clients and/or families in their homes following an overdose incident. Although we have not formally operated a program similar to ALERT in that anyone in the public can access the services, we do have Coaches who work to get clients into residential withdrawal management (detox) and residential levels of care by meeting the client, making arrangements, and offering transportation. They also facilitate follow ups with the clients and ensure warm handoffs to providers to help the client navigate the treatment system.

Continuation of weekly Recovery Groups at the Huron County Jail. Rigel Recovery Services currently works with the Huron County Jail to provide substance use assessments and Medication Assisted Treatment. We would work closely to expand these services to include the weekly recovery groups provided by existing peer support specialists.

Expansion to include one-on-one services and create warm handoffs to the community. At Oriana House, Recovery Coaches carry caseloads of up to 20 clients who they meet with individually in a variety of contexts. This can include meeting the client in their own community (for example, meeting at the local library in the client's town), taking the client to meetings to serve as the "first sober support" and introduce them to meetings, or taking the client to a job interview. In the one-on-one meetings, Coaches develop wellness plans to help clients achieve their goals. These goals can include anything from increasing sober support, to learning how to budget, and how to apply for insurance. Recovery Coaches also hold group sessions, assist with transportation, and provide linkage to the local recovery community through recovery-based activities and support meetings.

3. Number of proposed staff/staffing plan for HC:

4 full time Recovery Coach positions and a full time Clinical Coordinator

4. Collaboration with local agencies:

OHI works closely with many local community partners to facilitate the referral of clients to the appropriate OHI program. In addition, OHI will link clients to community resources based on identified client's need. Rigel Recovery Services and the NOBARS program in Huron County currently have existing relationship and collaborations with Firelands Counseling and Recovery Services, Family Life Counseling, Huron County Jail, Huron County Job and Family Services, Huron County Court of Common Pleas, Norwalk Municipal Court. We would create and build relationships with Fisher Titus Medical Center and Mercy Health in Willard in order to accept referrals and link clients as needed. One of the greatest assets RCs provide is their expertise on the resources the community has to offer, and they can facilitate linkages between clients and these resources.

5. Timeline:

With funding expected to begin February 1, 2020, the following plan would be implemented. Final timeline is contingent upon filling positions with qualified professionals.

- February 1 – begin employment search for personnel not already hired
- By March 31 – all staff to have started employment and training
- March/April – Clinical Coordinator will begin working with area collaborators to ensure understanding of the program and how to refer individuals
- March/April – all staff involved will train with experienced Peer Support Specialists on the ALERT system and QRT
- April – begin work on Coffee House (with expanded funding option)

- By April 30 – Recovery Coaches to have completed basic onboarding training and begin services
- April – acquire van for transportation
- May 1 – Recovery Coaches begin accepting referrals for clients
- May 15 – (or as soon as Recovery Coaches have completed training) take over the ALERT response team, including coordinating volunteer schedules and staff begin on call responsibilities
- May 15 – Recovery Coaches begin Recovery Groups at the Huron County Jail
- June – open Coffee House (with expanded funding option)

6. Experience:

Oriana House, Inc. operates peer support services in all four regions of the organization (Summit County, Cuyahoga County, Washington County, and the North Central Ohio region). OHI's peer support service began in 2012 in Akron with a single volunteer and has since grown to include nearly 40 Recovery Coaches that serve in a variety of contexts, including serving courts, operating a recovery house in Akron, and maintaining two "coffee house" locations where clients have a safe, sober space to come and enjoy the company of others in recovery.

7. Medicaid and financial stability plan:

Following state standards, each Recovery Coach can see up to 20 clients maximum as ongoing clients. Once a person is a certified Peer Support Specialist, they can bill Medicaid for these services. Once staff are certified and complete their orientation period with the agency, Coaches are typically able to provide enough direct billable services through Medicaid to sustain their position. Recovery Coaches often do many non-billable services during the remainder of their week, including transporting clients or seeing clients at the jail. The Clinical Coordinator's scope of practice will include case management services, and therefore be able to offset some of the cost of their own position.

8. Mental Health? Not addressed

9. Transportation? Yes

Clients who are engaged in recovery coach services will be provided transportation as needed to appointments and goals as it relates to their wellness plan. This could include transportation and attending a 12-step or non-secular meeting, coming or going to treatment appointment, going to the grocery store to learn how to shop for healthy foods, or going to Job and Family Services to apply for benefits. Coaches will cater their transportation to each client's individual needs.

10. Peer Center?

Oriana House has created two independent "coffee houses." These are safe spaces meant for clients to access and feel comfortable in a recovery environment. Recovery Coaches often operate out of the same building, so that clients can also meet one-on-one with their Coach while enjoying a relaxing environment with books, music, art, board games, and coffee. In Huron County with the proposed expanded funding, we would have open hours while coaches are present where clients are welcome to sit and enjoy. This is very important for people early in recovery, who may not yet be comfortable building new relationships in the community. When asked about the coffee house in Akron, one client said, "I don't know how to go and sit somewhere... it just feels so normal, and I've never done that." In addition to open hours, there would be classes and events available for which clients to drop in, including life skills, self-care activities (such as painting or crafts), or talent shows, as well as computer access for job search.

11. Financial request: \$368,588

The add-on budget (called ‘expanded funding’ throughout the proposal) includes the 4 RC positions, 1 Clinical Coordinator, transportation, and would expand services that would include funding for a “coffee house” wellness center (described later in this proposal). This would add \$6,000 to the overall submitted budget, which includes \$2,500 in startup costs (TV, furniture, games, books, coffee machine) and \$300 a month in ongoing costs (snacks, events, water, and coffee).

12. Feedback:

- a. Impressive plan, however, financial request is very high and not clear as to why it is so high
- b. Transportation services are not clearly defined

13. Questions:

- a. Would you also be providing mental health peer support?
- b. Does the line item funding for salaries & wages and fringe benefits go away once staff onboarded and able to bill Medicaid?
- c. What are hourly rates for Recovery Coaches and Clinical Coordinator?
- d. What groups will you be offering?
- e. Do you plan to work with any of the current peers?
- f. How would the transportation for peer services work with one van?

1. Organization: Sandusky Artisans

2. Plan:

SARCC will provide the following:

- a. Operate and expand existing peer support services in Huron County including continuation of ALERT program and participation in QRT program. ALERT services currently consist of on-call peer services to Norwalk PD, Huron County Sheriff’s Office and Willard PD, managing and responding to peer support related calls received from the ALERT hotline, and weekly recovery groups at the Huron County Jail. The goal is to ensure 24/7 access to peer support for individuals seeking treatment and recovery, utilizing the current hotline number (980-4ALERT4).
- b. Expansion of peer support services in Huron County to include ongoing one-on-one peer support services as needed and requested from community members and agencies, warm handoff services with local hospitals (FT and Mercy).
- c. Partnerships with all treatment agencies, providing peer support services for existing clients of these agencies.
- d. Community outreach and education
- e. Transportation of clients to treatment or other locations as needed

3. Number of proposed staff/staffing plan for HC:

Unclear number of peer supporters they plan to have locally and unclear as to whether they plan to work with any of our current peers.

4. Collaboration with local agencies:

Does not specifically list a plan on how SARCC plans to collaborate or what agencies they plan to work with.

5. Timeline:

Not clear based on proposal.

6. Experience:

Providing peer services since 1996 in Sandusky. Extensive list of awards and accomplishments listed.

7. Medicaid and financial sustainability plan:

SARCC does not bill Medicaid currently. “SARCC will meet the required needs to bill Medicaid per MHAS request in a timely manner to which both parties agree”. SARCC will contact Medicaid, OhioMHAS and appropriate sources to bill Medicaid immediately. SARCC currently contracts and has MOUs with stakeholders in the area they serve and will present MOUs and contracts to all potential HC entities to be served. SARCC will continue to work on securing funding sources from local, state and federal entities.

8. Mental Health? Yes

9. Transportation? Yes

10. Peer Center? “SARCC will endeavor to meet the proposed MHAS requirements for a peer-run community center. SARCC will replicate SARCC for Huron County MHAS employing SARCC’s established methodologies.

11. Financial request: \$24,326 for remainder of FY20

12. Feedback:

- a. Multiple impressive letters of recommendation were provided
- b. Proposal is very high-level and lacks details/specifics
- c. Answers for questions around timelines were very vague and questions were not thoroughly answered with specific timelines not provided.

13. Questions:

- a. What is the specific implementation plan?
- b. What is the timeline you anticipate?
- c. How many peers do you plan to have in HC?
- d. What groups will you be offering?
- e. Do you plan to work with any of the current peers?

Attachment II

Michael Pack Complaint Response

Page 1

Mr. Pack accused Ms. Cardone of discrimination and claimed Ms. Cardone overstepped her job duties. Details of what he means by this are not clear.

Mr. Pack states a conflict of interest has occurred by having a Director that worked for a former provider.

Our bylaws do not indicate that previous employment by a funded agency is a conflict of interest. Board members were aware that Ms. Cardone worked for a funded agency prior to being hired. Furthermore, Ms. Cardone does not make funding decisions for applicants, that is the duty of MHAS Board.

Regarding Mr. Pack's comments about a non-profit for peer support and building a recovery community center, Mr. Pack stated he was working on a non-profit for peer support and wanted to build a recovery community center but never submitted a proposal or proof of the establishment of a non-profit.

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Mr. Pack states Ms. Cardone asked him to not give a proposal for his community center until later in the year because she was new, and we had new Board members and she did not want them to deny his request.

Ms. Cardone asked Mr. Pack to wait to submit a proposal until he had developed a clear plan, detailing exactly what he was planning to do and what services would be provided and established a business (a non-profit per Mr. Pack's preference) as those are required items to be included in a proposal. Ms. Cardone never asked Mr. Pack to wait because she was new or because there were new Board members.

Mr. Pack did have people helping him, including Ms. Carol Knapp, and he began working with Ms. Knapp at the recommendation of Board staff as he needed assistance in developing his business plan and Board staff informed Mr. Pack that they were not able to help him do that. Ms. Carol Knapp called the office multiple times requesting guidance from Board staff as she was confused about what Michael was asking and how she could help him.

Mr. Pack states he scheduled meetings with OhioMHAS and Ms. Cardone emailed or called OhioMHAS on 4 different occasions to cancel these meetings.

Mr. Pack did say he was setting up meetings in Columbus and invited Ms. Cardone. When Mr. Pack initially mentioned wanting to set up meetings in Columbus, Ms. Cardone recommended Mr. Pack put together a clear plan prior to meeting with individuals at OhioMHAS. Ms. Cardone also recommended Mr. Pack wait to set up these meetings until meetings had been held with community partners in Huron County and the new OhioMHAS Director was appointed (the Director at that time was interim Director Dr. Hurst). Mr. Pack mentioned meetings in Columbus at other times and Ms. Cardone was unable to attend these meetings (none of which were with Director Criss) however she stated he was welcome to attend without her. Ms. Cardone did not cancel any meetings with OhioMHAS regarding Mr. Pack's proposal.

Mr. Pack accuses Ms. Cardone of abusing power but does not specify how. He goes on to discuss a meeting in Willard regarding his ideas for a community center.

Board staff attended a meeting in Willard regarding Mr. Pack's plan for a community center at the request of Mr. Pack. Mr. Pack stated the railroad was donating land for him to build a 20,000 sq. ft community center. Ms. Cardone asked questions such as: what services would be provided, how many peer supporters would be performing services, who would run the center, how the center was going to be funded, what Michael was going to do about liability insurance, if Mr. Pack had a business plan that outlined everything. Mr. Pack did not have answers for these questions.

Mr. Pack states that Ms. Cardone stated, in a meeting with Huron County Economic Development, that she was moving his non-profit to Norwalk.

Ms. Cardone did not advise Mr. Pack she was "moving his non-profit" to Norwalk. She suggested maybe starting his services in Norwalk, as Mr. Pack had originally planned to do, since peer services were already being conducted in Norwalk, the majority of peer supporters involved lived in Norwalk, and because there was some resistance toward Mr. Pack in Willard, and then expand once he had established a program.

Mr. Pack states Ms. Cardone stated that "nobody wanted a program in Willard".

Ms. Cardone never said, "nobody wants a program in Willard". There was some resistance from individuals toward Mr. Pack in Willard so Ms. Cardone said it may be best to start in Norwalk where he would be met with less resistance and then branch out to surrounding areas after the non-profit and services are established.

Mr. Pack states that Ms. Cardone shared his business plan.

Mr. Pack did not have a business plan, so Ms. Cardone did not, and would not have been able to, share his business plan with anyone.

Mr. Pack states that Ms. Cardone informed him that she would be using the grant for the county because his non-profit would not be in business in 30 years.

Mr. Pack was not aware that the grant he discussed was a 30-year commitment. Ms. Cardone shared that the grant in question was not free money as Mr. Pack made it sound like. It was in fact a "30-year mortgage" and would have to be used for an operation that would not change for at least 30 years. Mr. Pack stated he wasn't planning on being here that long and that his goal was to start something and then pass it on for the Board to run. Ms. Cardone never wanted to "take control of the grant", again, this is a grant from the state that anyone can apply for.

Mr. Pack stated ALERT was a 100% failure.

ALERT was NOT a 100% failure and below are responses to that accusation:

1. Wellington's program is not Huron County's program, and you cannot compare the two
2. The Firelands Hotline was not called often and to the best of my knowledge, there has not been any damage done. There was confusion on the part of the hotline when people called from places other than the jail or police department. Because of this, a separate hotline for ALERT was established, to reduce confusion and make the process simpler for everyone.
3. Mr. Pack never made a call-in line for Ms. Cardone, she created her own. Mr. Pack suggested Grasshopper for a call-in line, Ms. Cardone found a cheaper option online and created a hotline number for ALERT.
4. Rhonda Skidmore resigned from ALERT after speaking with Ms. Morrow and determining there was not a great need for volunteers with the expansion of ALERT services.
5. ALERT now offers many ways for people to get help, they do not just go to law enforcement.

Mr. Pack states that Firelands was awarded a record amount of money by the Board.

This is not true, as evidenced by past contracts.

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Mr. Pack states Ms. Cardone informed him that he could not participate in QRT because of his felony marijuana conviction.

Ms. Cardone never knew about a felony marijuana conviction and never told Mr. Pack he couldn't participate in QRT. QRT was established and implemented before Ms. Cardone took her position by Beth Williams. Mr. Pack was known to accuse Dr. Williams of not letting him participate either.

Mr. Pack submitted a background check prior to starting with the ALERT program and his background check did not show a marijuana conviction.

We are unsure of how many people Mr. Pack placed in treatment or detox (claims he placed "every addict" for the police dept for years), we only have the documentation that he provided to MHAS and he was compensated for those services.

Mr. Pack claims there has not been one successful placement from the QRT program, however there are people who have been reached through that program and connected to LOCAL recovery resources such as Firelands, Family Life Counseling, and Oriana House.

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Mr. Pack states he informed Ms. Cardone that Family Life Counseling was engaging in Medicaid fraud and she did not do anything about it.

Mr. Pack has made multiple claims against Family Life and John Chime regarding Medicaid fraud and its resulting harm (copies of messages are available from Facebook Messenger) however when asked by Ms. Cardone and Ms. Morrow for reasons or evidence of his claims he was unable to provide an answer or evidence regarding these allegations. Ms. Cardone cannot investigate his claims without proof and a Medicaid fraud accusation is investigated by Medicaid, not Ms. Cardone. Ms. Cardone never stated that she was not going to investigate, she simply asked for evidence.

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Mr. Pack asks the Commissioners to find out why Family Life Counseling was refunded this year after it did not spend the moneys it was allocated in FY19.

Mr. Pack is correct when saying that FLC did not spend all the money it was awarded the previous year, however the Board members agreed to continue to fund services but reduced the amount awarded and increased the amount of reporting required. The Board made this funding decision and Ms. Cardone was not involved in the making of this decision.

In fact, Ms. Cardone implemented a new reporting system that the Board approved so that ALL agencies will be held to a higher accountability with the funding they are awarded.

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Mr. Pack states that Ms. Cardone told him there are no local funds available to fund his non-profit.

Ms. Cardone never told Mr. Pack there were no local funds to fund his non-profit. Again, Ms. Cardone told Mr. Pack to get his business plan developed along with a plan for services at which time he could complete a proposal and approach the Board for funding. However, Mr. Pack contradicts himself when he blames Ms. Cardone for telling him there are no local funds, forcing him to seek out state funds but also states he began seeking them a year before she became director.

Mr. Pack states Ms. Cardone told him he would not get paid for transporting a Huron County resident from St. Louis and that “Lorna Strayer wasn’t my boss and that she was in control of the fund”.

Ms. Cardone never refused to pay Mr. Pack for a transport he did from St. Louis. Mr. Pack was actually not given permission to go to St. Louis for this transport as an ALERT call as he did not ask prior to going. He was scheduled to man the booth at the Strawberry festival and cancelled to go pick up this individual. Lorna Strayer called Ms. Cardone and said she asked Michael to go and it was up to Ms. Cardone if she wanted to reimburse him. At this time, Fisher Titus still held the ALERT donation funds. Ms. Cardone stated she was in agreement with reimbursing him for his expenses. However, Mr. Pack could not produce receipts from the trip and without receipts the Board cannot reimburse someone. Mr. Pack told Ms. Cardone he gave the receipts to “some lady at the front desk” at Fisher Titus to give to Katie Chieda. He does not know who the lady is or what front desk. But again, without receipts Ms. Cardone cannot authorize a payment in the amount of almost \$400 to Mr. Pack. Also, Mr. Pack never turned in any paperwork to the Board for this transport.

Mr. Pack did not receive the phone call because Firelands was “mismanaging” the call-in line. The phone call he received was from Lorna Strayer whose friend’s son needed help.

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Mr. Pack states he was called in to the office regarding a HIPAA violation after his trip to St. Louis.

Mr. Pack was called in and asked to sit down and discuss some concerns regarding his behavior and his paperwork, as well as a HIPAA violation concern because Mr. Pack was taking and posting selfies with clients of the ALERT program and putting them on Facebook. The HIPAA violation had nothing to do with Mr. Pack’s trip to St. Louis. Mr. Pack was written up during that time because there needed to be documentation and a plan on how to address these concerns. Other organizations may have pictures of clients however, they

are part of a community center, ALERT clients are working one on one with peer supporters and to protect their privacy we do not allow peer supporters to post selfies on social media.

Mr. Pack states that he has received calls and texts from Sandusky Artisans' peer supporters informing him that Ms. Cardone has partnered with the Artisans for peer support in Huron County.

We do not know who is calling or texting Mr. Pack regarding "partnering with the Artisans" for peer support however that has never happened. Ms. Cardone does not have the authority, per the Ohio Revised Code, to enter into any contract for services without approval by the Board. Ms. Cardone and Ms. Morrow met with the Artisans to discuss what services they provide in Erie County because the Commissioners and others in Huron County have expressed interest in a peer center and the county is in need of peer services. Ms. Cardone wanted to find out what other peer centers are doing and how they provide their services. She neither stated that the Artisans would be providing the services nor asked them to provide the services, she simply had a conversation with them to get feedback on what and how it is done.

Mr. Pack states that jail services were started by him and were taken away from him and given to FI Community Housing.

The jail services were not taken away from Mr. Pack. Jail services were given to FI Community Housing, however, at that time Mr. Pack worked for FI as he was an integral part of bringing FI Community Housing to Huron County and collaborated with Denny Wilson on many projects. In spring of FY19 the jail administration decided not to allow FI Community Housing to conduct services in the jail any longer and instead asked ALERT to provide the recovery group services. Mr. Pack was part of doing groups on Sundays until he resigned from the ALERT program.

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Mr. Pack claimed to have brought peer support to the county and trained and taught peer supporters

This is untrue as Ms. Kay Carr has been operating a similar program, Parri, for several years in Willard (before Mr. Pack moved to Huron County in 2017). In addition, Drew Riley was a peer supporter for Let's Get Real for a couple years before Mr. Pack came to town. Mr. Riley did replace Mr. Pack as a supervisor, however, prior to this happening Ms. Cardone and Ms. Morrow met with Mr. Pack to discuss the possibility, get his thoughts, and brainstorm alternate solutions. The Board has been informed of the reasons behind this decision.

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Mr. Pack states he informed Ms. Cardone of an alleged incident that happened during the Peer Support conference in Columbus during which Mr. Riley is reported to have kicked Mr. Pack out of his room so he could share a room with Ms. Hoover.

Mr. Pack did inform Ms. Cardone of the alleged incident with Mr. Riley in Columbus; however, it was only mentioned after Mr. Pack was confronted about a verbal altercation he instigated during the conference with Mr. Denny Wilson. Ms. Cardone received a call OhioMHAS regarding the incident and when questioned, Mr. Pack immediately began talking about the sleeping arrangements and stated that Mr. Riley needs to be talked to. Ms. Cardone did not investigate, not because her and Mr. Riley were previous co-workers but since no other peer supporter, including Ms. Hoover, filed a complaint and that Mr. Pack was unable to provide any evidence

of this alleged incident. Additionally, none of the individuals in question are employees of the Board, nor were they working for the Board while they were there. Therefore, Ms. Cardone did not have any oversight responsibility regarding these allegations.

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Mr. Pack states that Mr. Riley was promoted to supervisor because “his clients were not showing up” at FLC.

Mr. Riley was not promoted to supervisor because “his clients were not showing up” and Ms. Cardone never said that. Mr. Riley and Mr. Pack were both peer support supervisors in the beginning of the ALERT program. Over the course of a few months, Mr. Pack would go MIA and we would not know his whereabouts. Mr. Pack also was not completing paperwork as instructed or following the policies and procedures of the program. It also became difficult for other peer supporters to receive feedback and information from two different supervisors, so Ms. Cardone made the decision to keep Drew Riley as the supervisor after having a discussion with Mr. Pack regarding this. During the discussion Mr. Pack stated it is hard for him to complete the paperwork and so she worked with him to determine a role that would allow him to continue to participate in ALERT but would also utilize his strengths. Mr. Pack liked to transport and he struggled with the paperwork so Ms. Cardone decided to make Mr. Pack Director of Transportation Services as she felt that this would be beneficial for Mr. Pack and still allow him to be involved.

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Mr. Pack states Ms. Cardone never provided him with paperwork and says he can’t properly file. It is not clear what he is referring to.

Mr. Pack states Ms. Cardone broke his confidentiality by telling his employer his personal information without his permission.

Ms. Cardone did contact Mr. Pack’s employer, Tom Sharpnack, regarding a concern she had with Mr. Pack. Michael had been acting erratic for a period of time and then went MIA. Ms. Cardone was worried and contacted his employer as Mr. Pack’s employer is also a HCMHAS Board member. There was some confusion with the stories Michael was sharing regarding his employment and some personal issues he was sharing so Ms. Cardone, out of care and concern, contacted Mr. Sharpnack to see if Michael was doing ok, if he had heard from him, and if he might be concerned as well. Ms. Cardone spoke with Mr. Strickler regarding the situation and Mr. Strickler stated there was no violation of confidentiality as Ms. Cardone contacted one of the Board members, one of her bosses. Ms. Cardone did not reveal any HIPPA protected information or any information required to be confidential under the law. Furthermore, Ms. Cardone did not contact anyone outside of the Board regarding this issue.

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Ms. Cardone was aware of Mr. Pack’s lack of medical insurance. (I am unsure of which negligent employer he is referring to). That is why Ms. Cardone, with her own money, bought Mr. Pack a \$50 gift card to purchase his mental health medications that he needed.

Mr. Pack states Ms. Cardone took his funding source and sold his non-profit.

We are unaware of why no one would hire Mr. Pack, however Ms. Cardone did not take any funding source from Mr. Pack or sell his non-profit (that is impossible to do). Mr. Pack never applied to any funding source that Ms. Cardone was aware of and has no idea what Mr. Pack did with his non-profit.

Mr. Pack states that he and Ms. Carr are not allowed to work with Willard PD.

Willard PD still uses Kay Carr as does ALERT. Ms. Carr does not do the transportation however because she is not a certified peer supporter and without a certification, that is a liability to the Board and to her. Regarding Willard PD not using Mr. Pack, there have been conversations in the Willard area with individuals who do not want to work with Mr. Pack due to lack of trust issues. Additionally, Willard wanted to meet with all peer supporters who would be providing services and Mr. Pack was no longer a part of ALERT when that expansion happened.

Mr. Pack states ALERT is using his personal and non-profit slogan (It's ok to not be ok).

ALERT (and many other organizations nationwide) use the slogan "It's ok to not be ok". If this is trademarked by Mr. Pack and he would like it to stop, please provide that documentation.

Ms. Cardone has never canceled a meeting with OhioMHAS.

As far as paying him for his non-profit and the cost of registering it, that is not the Board's responsibility.

Mr. Pack states that Ms. Cardone and Ms. Morrow are supervising peer supporters.

Ms. Cardone and Ms. Morrow are not certified peer supporters who are conducting supervision for peer support. Mr. Riley is the supervisor for peer services. Mr. Pack is correct that Ms. Morrow and Ms. Cardone are not able to supervise peer supporters, and neither one are directly supervising peer supporters.

It should also be noted that Mr. Pack elected to no longer participate in ALERT, stating he had a job offer with the state that he wanted to pursue. He later said he left because he didn't want to work for Mr. Riley. He said he had to leave because "they are calling coris work sending certified letters to my work trying to subpoena me I don't want to harm are county Drew better quit this he's been told for a year it will ruin ALERT and if a take the stand it will be on every news network in Ohio. I just want to quietly move. I'm owed that I've been avoiding a subpoena. Sorry for taking my anger out on you my life's and 5 years work down the drain" (received through Messenger on August 16)