

**New Freedom Initiative:  
Building Sustainable Systems for Independence**

**Agenda**

**Monday, February 28, 2005**

- 7:30 am – 9:00 am      **Registration and Light Refreshments**
- 9:00 am – 12:00 pm    **Concurrent Preconference Sessions (GRANTEES ONLY)**
1. 2004 Grantees ..... Harborside C
  2. 2001-2002 Grantees..... Harborside A/B
  3. ADRC (Renaissance Harborplace Hotel)
  4. CPASS & IP (2003 Grantees) ..... Waterview D
  5. Direct Service Workers ..... Waterview C
  6. Family to Family..... Waterview B
  7. Money Follows the Person ..... Essex A
  8. Quality Assurance/Quality Improvement ..... Waterview A
  9. Respite..... Falkland
  10. Ticket to Work/MIG..... Harborside D/E
- 12:00 pm – 1:00 pm    LUNCH ..... **Harborside Foyer**
- 1:00 pm – 1:30 pm    **Welcome and Overview ..... Harborside Ballroom**
- Carmen Keller  
Deputy Director  
Center for Medicaid and State Operations  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD
- Mark McClellan, M.D., Ph.D.  
Administrator  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD
- Dr. McClellan will provide a brief overview of the current major initiatives of the Centers for Medicare & Medicaid Services. He will briefly present upcoming changes to the Medicare program as a result of the Medicare Modernization Act. He will also discuss recent improvements to the Medicaid program. These changes will improve benefits for Medicaid beneficiaries and also help to reduce state costs.

1:30 pm – 2:15 pm **My Education, My Life** ..... **Harborside Ballroom**  
 Joseph and John Angelo  
 Indiana, PA

Come learn from an adult with Down Syndrome about factors that contribute to successful transition and career development. Hear one family's perspective about critical factors to consider in the development and implementation of effective and inclusive Individualized Education Plans (IEP) and transition plans. Stereotyped beliefs about capabilities of persons with Down Syndrome and other developmental challenges will be diminished.

2:15 pm – 2:30 pm BREAK

2:30 pm – 3:15 pm **The Good Life: A Work in Progress** ..... **Harborside Ballroom**  
 Brett Leake  
 Comedian  
 Louisa County, VA

This squeaky-clean, funny, life-affirming standup comedy routine will present thumbnail sketches of the four models of "The Good Life". Who's living the Hedonistic Life, the Active Life, the Contemplative Life, the Fatalistic Life? Vignettes of family members and how their lives relate, shed light on, and modify these models will be provided by comedian Brett Leake.

Upon completion of this session, participants will be able to:

- identify the four models of "The Good Life"
- reframe everyday problems--not as obstacles to living life fully but catalysts for flourishing
- reaffirm service to others as a necessary aspect of the good life.

3:15 pm – 4:30 pm **Plenary: Moving Mountains: Strategies for Promoting Systems Change**..... **Harborside Ballroom**

**Description**

Bureaucracies are, by design, resistant to new ideas, innovation, and change. Grant programs that seek to promote new promising practices and the integration of services and systems for persons with multiple disabilities often encounter significant, system-level roadblocks to success that frustrate creative thinking and prevent the implementation of new models for treatment, housing and supportive services designed to stimulate recovery and increase independence in the community. More frequently than most of us might care to admit, system-level gaps and barriers contribute to client frustration, provider burnout and "failures" for which blame is incorrectly placed on consumers and/or care providers, rather than on the shortcomings of the systems themselves.

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This plenary session will offer a new model for defining human service delivery systems and understanding the process of systems change. The building blocks of systems change will be outlined, and specific strategies for engaging in system change initiatives will be examined. Participants will have the opportunity to work in small groups to explore in detail different components of strategic thinking required to stimulate real and lasting change.

**Speaker** David Wertheimer  
Principal  
Kelly Point Partners  
Seattle, WA

5:30 pm – 7:00 pm **Reception and Poster Session ..... Harborside Ballroom**

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**Tuesday, March 1, 2005**

8:30 am – 10:00 am    **Plenary: Sustaining Systems Change ..... Harborside Ballroom**

**Description**                    This session will focus on key factors that foster enduring and meaningful systems change in social service delivery. Presenters will highlight the ingredients of a good community-based system from a consumer's perspective and how those ingredients can be explicitly embedded in a state's strategic plan. Speakers will also discuss value-based leadership at the state and community levels and the hierarchy of empowerment levels for consumers.

**Speakers**

Steve Eiken  
Research Leader  
Thomson Medstat  
Washington, DC

Lex Frieden  
National Policy Advisor  
National State-to-State Technical Assistance Program for Community Living  
Independent Living Research Utilization Project  
Houston, TX

Susan Reinhard  
Co-Director  
Rutgers Center for State Health Policy  
New Brunswick, NJ

Susan Fox  
Real Choice Systems Change Project Director  
Institute on Disability  
University of New Hampshire  
Concord, NH

Gerald J. Morrissey, Jr.  
Commissioner  
Massachusetts Department of Mental Retardation  
Assistant Secretary  
Massachusetts Executive Office of Health and Human Services  
Boston, MA

**Moderator**                    Melissa Hulbert  
Director  
Division of Advocacy and Special Initiatives  
Center for Medicaid and State Operations  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

10:00 am – 10:15 am BREAK

10:15 am – 11:45 am **Concurrent Breakout Sessions I**

**Concurrent Session A**

**Streamlining Access to Services ..... Laurel**

**Description**

Representatives of initiatives from Maryland, Pennsylvania and Massachusetts will discuss three efforts to streamline Medicaid eligibility for home and community-based services either in support of or directly related to the Aging and Disability Resource Center grants. Approaches highlighted will include:

- a web-based tracking system to monitor the application process through five different entities, expediting eligibility so that it can be accomplished within 48 hours if necessary
- coordinating across different agencies to create a no wrong door approach that also streamlines eligibility.

**Speakers**

Ann Volpel  
Senior Research Analyst  
Center for Health Program Development and Management  
University of Maryland Baltimore County  
Baltimore, MD

Dale Laninga  
Co-Director  
Pennsylvania Governor's Office of Health Care Reform  
Harrisburg, PA

Heather Johnson-Lamarche  
Project Director and ADRC Coordinator  
Massachusetts Aging and Disability Resource Center Grant  
Center for Health Policy and Research  
University of Massachusetts Medical School  
Worcester, MA

**Moderators**

John Wren  
Director  
Center for Planning and Policy Development  
Administration on Aging  
U.S. Department of Health and Human Services  
Washington, DC

Mary Jean Duckett  
Deputy Director  
Disabled and Elderly Health Program Group  
Center for Medicaid and State Operations  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

**Concurrent Session B**

**The Big Payoff: Employment Outcomes ..... Harborside A/B**

**Description**

Grantees will discuss successful strategies to increase the numbers of people with disabilities who are working in their states and to increase the earnings of individuals who are working. Presenters will show how data can be used to assess whether their strategies under the MIG have been successful and where opportunities exist for further program improvement.

**Speakers**

Elaine Richard  
Project Director and Medicaid Purchase Plan Program Manager  
Louisiana Medicaid  
Baton Rouge, LA

Abigail Averbach, M.S.  
Senior Project Director  
Center for Health Policy and Research  
University of Massachusetts Medical School  
Shrewsbury, MA

Cynthia Thomas  
Employment Services Coordinator  
Institute for Community Inclusion  
University of Massachusetts Medical School  
Boston, MA

Alice Porter  
Planning Coordinator  
Vermont Work Incentives Initiative  
Vocational Rehabilitation Division  
Vermont Agency of Human Services  
Waterbury, VT

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**Moderator** Millie Ryan  
Executive Director  
Alaska Governor's Council on Disabilities and Special Education  
Anchorage, AK

**Concurrent Session C**

**How Are the Grants Helping Consumers and  
How Are Consumers Helping the Grants? ..... Harborside C**

**Description** In bureaucratic organizations we sometimes focus on the "system" and forget that all of our grants are about creating change for individuals. This can most effectively be achieved by strong consumer participation. This session includes stakeholders who will discuss consumer and family member participation across grants. Panelists will discuss how grantees can support consumer involvement as well as give testimony regarding the impact of the grants on peoples' lives.

**Speakers**

Keith Jones  
Council Member  
Consumer Advisory Council  
Boston, MA

Diana Autin  
Executive Co-Director and Project Director  
New Jersey Statewide Parent Advocacy Network  
Newark, NJ

Michelle Hoffman  
Manager  
Center for Health Care Concepts  
Long Term Care Authority of Tulsa  
Tulsa, OK

Bonnie Olheiser  
Outreach Advocate  
The Dakota Center for Independent Living  
Dickinson, ND

**Moderator** Thomas Alexander  
Project Director  
North Dakota Center for Persons with Disabilities  
Minot, ND

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**Concurrent Session D**

**A Practical 101 Session on the Essentials of  
Housing Finance and Developing Affordable  
Housing Coordinated with Services ..... Harborside D/E**

**Description**

This workshop is designed for non-housing professionals, newcomers to the housing field, or those thinking about adding housing development to their portfolio of services. Attendees will learn:

- the terms and language used in the housing finance world
- the different types and purposes of affordable housing funding sources
- details on the major funding vehicle – Low Income Housing Tax Credits
- the math: what it costs to build a unit of housing and how it's paid for
- the varying perspectives of the developers, service providers, individual/family members, and investors.

**Speakers**

Patricia Sylvester  
Director  
Maryland Department of Housing and Community Development  
Baltimore, MD

Carla Berg Pope  
Service Enriched Housing Director  
Iowa Finance Authority  
Des Moines, IA

**Moderator**

Dina Elani  
Special Advisor  
Division of Advocacy and Special Initiatives  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD



**Concurrent Session E**

**Building-In Quality: Measuring It and Improving It..... Essex**

**Description**

This session will address the question states are asking: *What are CMS' expectations for Quality Management?* CMS staff will share CMS' expectations about the states' role in:

- designing Quality into the operational components of their programs
- assuming primary responsibility for monitoring programs and addressing threats to quality
- producing and using information to monitor and improve program quality.

**Speakers**

Suzanne Bosstick  
 Division Director  
 Division of Benefits and Coverage  
 Centers for Medicare & Medicaid Services  
 U.S. Department of Health and Human Services  
 Baltimore, MD

Tamara McCloy  
 Coordinator  
 Centers for Medicare & Medicaid Services/Philadelphia Regional Office  
 U.S. Department of Health and Human Services  
 Baltimore, MD

Becky Selig  
 Senior Research Leader  
 Thomson Medstat  
 Washington, DC

**Moderator**

June Rowe  
 Senior Project Director  
 Human Services Research Institute  
 Cambridge, MA

12:00 pm – 12:45 pm LUNCH ..... **Harborside Foyer**

1:00 pm – 2:15 pm **Concurrent Breakout Sessions II**

**Concurrent Session A**

**Formative Evaluation:  
What It Is and How to Do It..... Harborside A/B**

**Description**

Grantees are required to include a formative evaluation in their work plan. The purpose of formative evaluation – also called process or implementation evaluation – is to learn what works and does not work (and why) in order to successfully implement and sustain grant initiatives. It is a method that can include informal feedback as well as formal processes for policy analysis and the collection and analysis of data.

This session will discuss the type of information that can be collected as part of a formative evaluation, including data states already collect for existing programs, data from pilots or new programs, and an analysis of statutory or regulatory changes needed to bring about systems change. It will also discuss how to communicate findings and outcomes to key stakeholders, including state policymakers and CMS, and how this information will be used in the larger formative evaluation of the entire Systems Change Grants Program

**Speaker**

Janet O'Keefe, Dr.P.H., R.N.  
Project Director  
Systems Change Grants Program  
RTI International  
Research Triangle Park, NC

**Concurrent Session B**

**Supporting Family Caregivers ..... Laurel**

**Description**

Family and informal caregivers provide the vast majority of support and direct care to persons of all ages with disabilities. This workshop will discuss various programs supporting these caregivers from both a systems and a care giver's perspective. The session will present findings from the first national study examining publicly-funded family caregiver support services in all 50 states. The study focuses on aged/disabled Medicaid waiver programs and family caregiving, as well a commonalities and differences between waiver and other state programs to support family caregivers. It will also cover state approaches to offering consumer-directed options for caregiving families. Additionally, the mother of an 18 year old daughter with special health care needs will share first-hand how critical supporting family caregiving is for day-to-day living.

**Speakers** Lynn Friss Feinberg, M.S.W  
Deputy Director  
Family Caregiver Alliance  
National Center on Caregiving  
San Francisco, CA

Sandra Newman, M.P.H.  
Policy Specialist  
Family Caregiver Alliance  
National Center on Caregiving  
San Francisco, CA

Grace Sisco  
Project Coordinator  
North Carolina Family-to-Family Health Information and Education Center  
Davidson, NC

**Moderator** Marlene Walsh  
Deputy Director for Technical Assistance  
Rutgers Center for State Health Policy  
New Brunswick, NJ

**Concurrent Session C**

**Facilitating Partnerships and Building Coalitions Across Aging and Disability Service Networks ..... Essex**

**Description** This session presents findings from a study, "Explorations into Coalition Building: How Aging and Disability Service Networks are Partnering to Meet the Needs of Persons Aging with Disabilities," and interviews with stakeholders that identified factors that facilitate and impede building coalitions across disability and aging networks. The speakers will discuss:

- differences between building coalitions, collaborations and partnerships
- factors that contribute to successful coalition building
- results from a meeting of study participants to set priorities for future activity.

**Speakers** Michelle Putnam  
Assistant Professor of Social Work  
Washington University in St. Louis  
St. Louis, MO

Elizabeth Hecht  
 Director  
 Family Voices of Wisconsin  
 Madison, WI

Kirsten Dunham  
 Senior Policy Analyst  
 Paragard  
 St. Louis, MO

**Moderator**

Robert Mollica  
 Senior Program Director  
 National Academy for State Health Policy  
 Portland, ME

**Concurrent Session D**

**Building Relationships with Public Housing Agencies ..... Harborside C**

**Description**

This session will explore innovative models on how public housing agencies are integrating service supports for Medicaid recipients, both elders and individuals with disabilities. The workshop will host a presentation from the Housing Authority for the City of Milwaukee (HACM) on the Lapham Park Venture. The Lapham Park Venture is a collaboration of partner agencies who provide a continuum of care for Lapham Park residents that is seamless in delivery, and consumer-centered. This presentation will include discussion on the Family Care Plan, Wisconsin's Medicaid waiver, which supports service integration in HACM's 14 public housing locations. In addition, the session will provide perspective from the Housing Commission of Anne Arundel County located in Maryland on how this public housing agency provides supports for individuals with disabilities. This session will provide a discussion on how CMS grantees can utilize models providing services to the elderly and replicate these for individuals with disabilities under the age of 65.

**Speakers**

Ken Barbeau  
 Grant and Fiscal Manager  
 Older American Program Manager  
 Milwaukee Housing Authority  
 Milwaukee, WI

Stephanie Stein  
 Director  
 Milwaukee County Department on Aging  
 Milwaukee, WI

Clifton C. Martin  
 Operation Director  
 Public Housing Authority  
 Housing Commission of Anne Arundel County  
 Glen Burnie, MD

**Moderator** Michael Morris  
 Director  
 National Disability Institute  
 NCB Development Corporation  
 Washington, DC

**Concurrent Session E**

**How Complicated Can It Be?  
 Enrollment Strategies ..... Harborside D/E**

**Description** This sessions will describe how various states enroll people in the Medicaid Buy-In program. What segments of the population of people with disabilities are targeted? How do states ensure that individuals are in the appropriate Medicaid eligibility group? What is the role of benefits planners, eligibility workers, and others who advise people about the Medicaid Buy-In option? Presenters will discuss successful outreach strategies.

**Speakers** James Overland  
 Co-Project Manager  
 Iowa Department of Human Services  
 Des Moines, IA

Joan Zinser  
 Deputy Director  
 San Diego County Health and Human Services Agency  
 San Diego, CA

**Moderator** Roy Trudel  
 Technical Director  
 Division of Eligibility and Enrollment  
 Centers for Medicare & Medicaid Services  
 U.S. Department of Health and Human Services  
 Baltimore, MD

2:15 pm – 2:30 pm BREAK

2:30 pm – 3:45 pm **Concurrent Breakout Sessions III**

**Concurrent Session A**

**Creating A Multi-Program Web Site Through Collaboration ..... Harborside A/B**

**Description** Three states, Hawaii, South Carolina and New York, will discuss how their states are combining existing resources to increase access to information for persons of all ages with disabilities and those with long term care needs through a single entry point information system. Discussion will focus on the functionality of the site, cost savings to the state, and a new financial model for system development, growth and sustainability.

**Speakers**

Kevin Sypniewski  
President and Chief Executive Officer  
Assist Guide, Inc.  
Kailua, HI

Barbara S. Kelley  
Deputy Director  
Consumer Information and Caregiver Services  
South Carolina Lt. Governor's Office on Aging  
Columbia, SC

Angela S. Ruck  
Project Coordinator  
Eastern Adirondack Health Care Network  
Plattsburgh, NY

**Moderator**

Rebecca Rude-Ozaki  
Project Coordinator  
Real Choices ACCESS  
Center on Disability Studies  
University of Hawaii  
Honolulu, HI

**Concurrent Session B**

**The Power of Automated Assessment Tools ..... Laurel**

**Description** Good data drives policy and budget decisions! This session will present the use of automated assessment tools to establish acuity and payment levels, document consumer needs, generate service plans, support quality oversight and provide information needed by policy makers and legislators to consider the fiscal impact of policy decisions.

**Speakers**

Penny Black  
Director  
Home and Community Based Services Division  
Washington Aging and Disability Services Administration  
Washington State Department of Social and Health Services  
Olympia, WA

Mollie Baldwin  
Program Manager  
Maine Bureau of Elder and Adult Services  
Augusta, ME

**Moderator**

Robert Mollica  
Senior Program Director  
National Academy for State Health Policy  
Portland, ME

**Concurrent Session C**

**Establishing Individual Budgets –  
Models That Work ..... Harborside C**

**Description**

Creating budgets for individuals who are participant-directing requires careful consideration. This session provides a brief discussion of CMS requirements for the development of individual budgets as outline in the Independence Plus initiative. The session will focus on an in-depth review of the exemplary individual budget models in Minnesota and in New Hampshire, discuss how Fiscal/Employer Agents facilitate individual budgeting, and highlight recent IRS policy changes related to the implementation of Fiscal/Employer Agents.

**Speakers**

Pam Erkel  
Manager  
Minnesota Disability Services Division  
St. Paul, MN

Susan Flanagan  
Principal  
Westchester Consulting Group  
Washington, DC

Leslie Boggis  
Account Manager  
In-Home Supports  
Area Agency of Greater Nashua, Inc.  
Nashua, NH

Carole Smith  
Account Manager  
In-Home Supports  
Area Agency of Greater Nashua, Inc.  
Nashua, NH

**Moderator**

Suzanne Crisp  
Senior Research Leader  
Thomson Medstat  
Little Rock, AR

**Concurrent Session D**

**Exploring Home and Community-Based  
Options for Children with Serious  
Emotional Disturbances..... Essex**

**Description**

This session will provide information about states that are developing strategies to better serve children with severe mental illness in a less restrictive setting than a residential treatment facility. Two states that currently administer approved 1915 (c) Medicaid waiver programs will share information as well as two C-TAC grantees that are focusing on the development of home and community-based programs.

**Speakers**

Albert Zackik  
Director  
Office of Child and Adolescent Services  
Maryland Mental Hygiene Administration  
Cantonsville, MD

Kristi Plotner  
Division Director  
Mississippi Division of Medicaid  
Jackson, MS

Virginia Mulkern  
Senior Vice-President  
Human Services Research Institute  
Cambridge, MA

Marlene Walsh  
Deputy Director for Technical Assistance  
Rutgers Center for State Health Policy  
New Brunswick, NJ



**Moderator** Peggy Clark  
 Technical Director  
 Disabled and Elderly Health Programs Group  
 Division of Integrated Health Systems  
 Centers for Medicare & Medicaid Services  
 U.S. Department of Health and Human Services  
 Baltimore, MD

**Concurrent Session E**

**Effective Cross Grant Collaboration  
 and Coordination..... Harborside D/E**

**Description** Connecticut and North Carolina have developed effective collaboration strategies across multiple grants managed by separate entities. The presenters (individuals from various state and private agencies) will discuss how their projects complement each other, the collaborations that have been developed on systems change activities, and how consumers have driven the work of all of these projects.

**Speakers**

Christine Gaynor  
 Director  
 Real Choice Systems Change Grant  
 Center for Disabilities  
 University of Connecticut  
 Farmington, CT

Amy Porter  
 Project Director  
 Connecticut Bureau of Rehabilitation Services  
 Hartford, CT

Beth McArthur  
 Assistant to the Deputy Commissioner  
 Connecticut Department of Mental Retardation  
 Hartford, CT

Paul Ford  
 Project Coordinator  
 Connecticut Association of Independent Living Centers  
 Hartford, CT

Laura Nuss  
 Director  
 Connecticut Department of Mental Retardation  
 Hartford, CT

*In Memory of Elaine Wilson, (advocate and plaintiff in L.C. and E.W. v. Olmstead) who died December 5, 2004.*

Dawn Lambert  
Administrator  
Bureau of Rehabilitation Services  
Connecticut Department of Social Services  
Hartford, CT

Ann Eller  
CPASS Project Coordinator  
Developmental Disabilities and Substance Abuse Services  
Division of Mental Health  
North Carolina Department of Health and Human Services  
Raleigh, NC

Joseph Donovan  
Chair  
North Carolina CPASS Advisory Committee  
Raleigh, NC

Donna Holt  
Coordinator  
Office of Long Term Care and Family Services  
North Carolina Department of Health and Human Services  
Raleigh, NC

Linda Kendall-Fields  
Director  
Nursing Facility Transitions Grant  
Division of Vocational Rehabilitation  
North Carolina Department of Health and Human Services  
Asheville, NC

**Moderator**

Ron Hendler  
Health Insurance Specialist  
Division of Advocacy and Special Initiatives  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

3:45 pm – 4:00 pm      BREAK

4:00 pm – 5:15 pm **Concurrent Breakout Sessions IV**

**Concurrent Session A**

**Lessons Learned from Nursing Home  
Transition Programs ..... Harborside A/B**

**Description** Over the past three years, grantees have helped over 3,000 people move from nursing homes into the community. Grantees have developed effective outreach strategies, resources for consumers to use to understand their options, checklists and screens to support transition planning, and coverage of transition expenses. This panel will describe the lessons learned, barriers faced and the importance of collecting data to support this activity.

**Speakers**

Jacqueline Dunaway  
Project Director  
BRIDGES  
Massachusetts Department of Mental Retardation  
Worcester, MA

Cindy Gruman  
Senior Scientist  
Center on Aging  
University of Connecticut Health Center  
Hartford, CT

Paul Ford  
Project Coordinator  
Connecticut Association of Independent Living Centers  
Hartford, CT

Linda Kendall-Fields  
Director  
Nursing Facility Transitions Grant  
Division of Vocational Rehabilitation  
North Carolina Department of Health and Human Services  
Ashville, NC

**Moderator**

Margaret Chow-Menzer  
Assistant Commissioner  
Massachusetts Department of Mental Retardation  
Cambridge, MA

**Concurrent Session B**

**Identifying Policy Barriers to Self-Direction ..... Harborside C**

**Description** Two grantees have reviewed their laws and regulations to identify provisions that restrict self-direction. The speakers will describe their review process, the barriers identified and steps that are planned to improve state policy.

**Speakers** Valerie Bradley  
President  
Human Services Research Institute  
Cambridge, MA

Pattie Flury  
Aging Services Program  
Nebraska Department of Health and Human Service  
Lincoln, NE

**Moderator** Ann Eller  
CPASS Project Coordinator  
Developmental Disabilities and Substance Abuse Services  
Division of Mental Health  
North Carolina Department of Health and Human Services  
Raleigh, NC

**Concurrent Session C**

**Building Local Community Coalitions to Create and Sustain Successful Systems Change and More Inclusive Communities ..... Harborside D/E**

**Description** Real Choice grantees in Connecticut and New Hampshire selected municipalities to implement a variety of activities that enhance community inclusion and systems change. In this session, representatives from Connecticut and New Hampshire will discuss using consumer driven-community coalition building as a tool to creating inclusive and accessible communities that support all residents. Examples of how these activities have been embedded in town culture to create sustainable system change will be highlighted.

**Speakers** Christine Gaynor  
Director  
Real Choice Systems Change Grant  
Center for Disabilities  
University of Connecticut  
Farmington, CT

Susan Fox  
 Director Real Choice Systems Change Grant  
 Institute on Disability  
 University of New Hampshire  
 Concord, NH

Stan Kosloski  
 Community Facilitator  
 Real Choice Systems Change Grant  
 Center for Disabilities  
 University of Connecticut  
 Farmington, CT

Nicole LaPointe  
 Director  
 Littleton Model Community Project  
 Littleton, NH

**Moderator**

Jay Klein  
 Director  
 Center for Housing and New Community Economics  
 Institute on Disability  
 University of New Hampshire  
 Fort Collins, CO  
 Management Partner  
 Community Living Exchange  
 Independent Living Research Utilization Project  
 Houston, TX

**Concurrent Session D**

**Promoting Evidence-Based Practices in the Delivery of Mental Health Care ..... Laurel**

**Description**

This interactive session will feature seven Mental Health Transformation grantees who are implementing evidence-based practices, such as illness management and recovery and assertive community treatment, to empower consumers to better manage their mental illness and promote meaningful consumer involvement. The moderator will give the grantees questions to stimulate discussion and invite participants to share what is happening in their communities and states.

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**Speakers**

Melody Riefer  
Director  
Mental Retardation and Substance Abuse Services  
Virginia Department of Mental Health  
Richmond, VA

Glenace Edwald  
Director  
Children's Mental Health Division  
Minnesota Department of Human Services  
St. Paul, MN

Nancy Widdoes  
Administrator  
Child Mental Health Services Division  
Delaware Services for Children, Youth and their Families  
Wilmington, DE

Albert "Chip" Maltais  
Coordinator  
Bureau of Behavioral Health  
New Hampshire Department of Health and Human Services  
Concord, NH

James Martinez, Jr.  
Director  
Office of Mental Health Services  
Virginia Department of Mental Health, Mental Retardation and  
Substance Abuse Services  
Richmond, VA

Flo Stein  
Chief  
Community Policy Management Division  
North Carolina Division of Mental Health, Developmental Disabilities,  
and Substance Abuse Services  
Raleigh, NC

**Moderator**

April Forsythe  
Social Science Research Analyst and Project Officer  
Disabled and Elderly Health Programs Group  
Division of Benefits and Coverage  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

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**Concurrent Session E**

**Feast or Food Fight: Policy Implications of the  
Medicaid Buy-In ..... Essex**

**Description**

Data collected by the States and CMS to date suggests a very mixed result in terms of the success of the Medicaid Buy-In and our attempts to improve employment outcomes for people with disabilities. This session will explore program and policy changes that might improve the success of the Buy-In and the other efforts being undertaken by States. This will be a facilitated discussion.

**Speaker**

Henry Ireys  
Senior Researcher  
Mathematica Policy Research  
Washington, DC

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**Wednesday, March 2, 2005**

8:45 am – 10:00 am **Plenary: Current Status and Future Directions of CMS..... Harborside Ballroom**

Melissa Hulbert  
Director  
Division of Advocacy and Special Initiatives  
Center for Medicaid and State Operations  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

Dennis G. Smith  
Director  
Center for Medicaid and State Operations  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

Gale Arden  
Director  
Disabled and Elderly Health Programs Group  
Division of Benefits and Coverage  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

Dennis Smith will provide a brief overview of the major initiatives of the Centers for Medicaid and State Operations. He will discuss the current and upcoming changes to the Medicaid program and the impact of those changes for long term care.

Gale Arden will provide an overview of the strategic plan for long term care currently being developed by the Centers for Medicaid and State Operations. She will also discuss changes to Medicare Part D as a result to the Medicare Modernization Act and the impact of these changes for long term care.

10:00 am – 10:15 am **BREAK**



10:15 am – 11:45 am **Concurrent Breakout Sessions V**

**Concurrent Session A**

**Integrated Quality Management Systems:  
States' Experience..... Laurel**

**Description** In this session, states will describe their quality management systems and how they collect, integrate, and use information for discovery, remediation and improvement purposes. Panelists will highlight their successes, challenges, and their "works-in-progress."

**Speakers**

Vereen Bebo  
 Manager  
 Aging Division  
 Wyoming Department of Health  
 Cheyenne, WY

Gail Grossman  
 Assistant Commissioner  
 Quality Management  
 Massachusetts Department of Mental Retardation  
 Boston, MA

Karen McKim  
 Quality and Research Manager  
 Wisconsin Department of Health and Family Services  
 Madison, WI

**Moderator** Beth Jackson, Ph.D  
 Director  
 Home and Community Based Services Quality  
 Thomson Medstat  
 Cambridge, MA

**Concurrent Session B**

**Effective Emergency Back-Up Models for  
Consumers Who Self-Direct ..... Harborside A/B**

**Description** This session will describe CMS's requirement that states implement back up systems when regular providers of services and supports that are essential to the individual's health and welfare are not available to consumers who are directing their own services. The session will describe individual and system level back-up programs developed by grantees.

**Speakers** Daryle Doyle  
Department Head  
Provider Relations and Compliance  
South Carolina Department of Health and Human Services  
Columbia, SC

Leslie Boggis  
Account Manager  
In-Home Supports  
Area Agency of Greater Nashua, Inc.  
Nashua, NH

**Moderator** Susan Reinhard  
Co-Director  
Rutgers Center for State Health Policy  
New Brunswick, NJ

### **Concurrent Session C**

#### **Worker Recruitment and Retention Strategies..... Harborside C**

**Description** Offering health insurance and training have proven to be effective strategies to improve recruitment of supportive services workers. This session will describe the strategies, processes, and factors considered, the challenges encountered in trying to implement each intervention and their outcomes.

**Speakers** Karen Antonick  
Grant Coordinator  
Montana Department of Public Health and Human Services  
Helena, MT

Angela King  
Director of Program Development  
Volunteers of America  
Alexandria, VA

Elise Scala  
Project Director  
Edmund S. Muskie School of Public Service  
University of Southern Maine  
Portland, ME

Jill Burke  
Vice President  
Long Term Supports  
Granite State Independent Living  
Concord, NH

**Moderator**

Kate King  
Health and Insurance Specialist  
Division of Advocacy and Special Initiatives  
Centers for Medicare & Medicaid Services  
U.S. Department of Health and Human Services  
Baltimore, MD

**Concurrent Session D**

**How Medicaid Can Support the  
Mental Health Recovery Model ..... Essex**

**Description**

This session will showcase several of the 2004 Mental Health Transformation grantees whose grants focus on developing infrastructure to support consumer-direction or the use of peer support programs (including training and certification programs) to help with transitioning persons with mental illness into community and home-based care.

**Speakers**

Christine Robinson  
Director of Staff Training and Development and Best Practices Coordinator  
Maine Department of Health and Human Services  
Augusta, ME

Linda Cabral  
Project Director  
Center for Health and Policy Research  
University of Massachusetts Medical School  
Shrewsbury, MA

Rollin Shelton  
Director  
Office of Consumer/Survivor Technical Assistance  
Regional Research Institute  
Portland State University  
Portland, OR

Christine Simiriglia  
Senior Division Director  
Mental Health Association of Southeastern Pennsylvania  
Philadelphia, PA

**Moderator** Maria Reed  
 Disabled and Elderly Health Programs Group  
 Division of Integrated Health Systems  
 Centers for Medicare & Medicaid Services  
 U.S. Department of Health and Human Services  
 Baltimore, MD

**Concurrent Session E**

**Do Employment Services Support Self-Determination ..... Harborside D/E**

**Description** Too often people with disabilities work in segregated settings and receive services and supports in segregated settings. They do not get to choose their career or their employment. They do not get to control where and when they receive the services and supports they need to be successful. This session will explore successful programs to overcome these barriers for people with disabilities entering the labor force.

**Speakers** Michael J. Head  
 Director  
 Office of Consumer-Directed Home and Community Based Services  
 Michigan Department of Community Health  
 Lansing, MI

MaryAlice Mowry  
 Director  
 Ticket to Work Program  
 Minnesota Medicaid Department  
 St. Paul, MN

**Moderator** Scott Holladay  
 Project Manager  
 Arkansas MIG Grant  
 National Academy for State Health Policy  
 Little Rock, AR

11:45 am – 12:00 pm BREAK

12:00 pm – 12:15 pm **Closing Comments ..... Harborside Ballroom**

Dennis G. Smith  
 Director  
 Center for Medicaid and State Operations  
 Centers for Medicare & Medicaid Services  
 U.S. Department of Health and Human Services  
 Baltimore, MD

*In Memory of Elaine Wilson, (advocate and plaintiff in L.C. and E.W. v. Olmstead) who died December 5, 2004.*

