

M E M O R A N D U M
Dakota County Community Services Planning
33 East Wentworth Avenue
West Saint Paul MN 55118
(612) 450-2809

DATE; December 4, 1991

TO; Ron Kaliszewski

FROM; Meg Grove

RE; Final report on Dakota County Account
Management Project

Dakota County is pleased to submit this summary of the account management project's second year. It doesn't seem possible the two years have gone by since we took our first tentative steps toward having families control the government funds once overseen by social workers. The project has gained so much attention and credibility in that time that it will lose its "project" status in 1992 and will become an option for most of the other families being served by county social workers.

This report will address in turn: the client outcomes, participant trainings, implications of expanding the project in year 2, the advisory committee, "getting the word out," involvement of ARC Suburban, proposed legislation, and a word about the future.

Dakota County would like to thank the Governor's Planning Council on Disabilities for the opportunity to experiment with this concept, as well as for the support and encouragement given project staff.

A. CLIENT OUTCOMES

1. Use of more informal and alternative providers

The seed of the account management project was families' dissatisfaction with the respite care they were receiving through county-contracted agencies. As county staff heard from many families, the county-contracted respite providers were too expensive, and were not flexible enough with their schedules. Families also complained that frequent personnel changes disrupted any continuity of care. Those families with more than one child found that these providers would only look after the child with disabilities, so they would have to hire a second caregiver for the rest of the family just to go out to dinner. With such a litany of complaints, families saw the project as a way to get respite care services from providers other than the county contractors.

Project staff are thrilled to report that families were able to accomplish this.

As expected, the single biggest category of expenditures to date (January - October 1991) has been respite care - nearly all of which, according to reports, has been provided by informal/alternative sources. (See ATTACHMENT A - a breakdown of expenditures.) Examples of such arrangements follow.

- One couple hired a daughter-in-law to transport their adult child between work and home while they took a much anticipated trip...one which they say would not have been possible without the funds.
- A mother of an adult used the funds to build her network of providers. "I like to plan ahead," she said. "I just kept asking around so that if one person fell through I always had a backup." This mother had a group of three or four neighborhood teenagers whom she paid \$3 per hour to include her son in their activities. "He needed to get out in the community and experience more things with different people," she explained. She differentiated between this type of group activity from that which focused on her son. For such individual attention she paid \$6 per hour. The flexibility of the funds "allowed each person to do something different" with her son, she pointed out.
- A family hired nieces and nephews at \$4 per hour to play with their young child. "It was so good for her to be with other kids," explained the mother.
- One family which has seven young children was able to hire a family friend to babysit for the entire group when the parents went out to dinner. "Otherwise we would have had to either take [the child with disabilities] to someone's house or hire another sitter for the other children."
- The parents of one young girl were hardly ever able to get out together because of the difficulty of feeding her. They were disappointed in county providers because of the turnover in personnel - they found they had to constantly train new staff in caring for the child. With project funds, the couple hired a neighbor who has known the child for a long time - "she's the only one [the child's] dad trusts to feed her. Now we're working on another friend who's a special ed. teacher."
- One family was able to use the funds to entice their child's grandmother to care for her. "We could say 'Mom, can you take her? We can pay you...'" Until

that point, the grandmother had been afraid of the child, according to the child's mother. The family also used the funds to pay a neighbor who was able to provide care on short notice. "The flexibility [of the funds] was so important to us," reported the mother.

- "I've changed my standards," said one mother. "When I was desperate for help, I settled for a clean home and a loving person. Now I want a provider to challenge [the child}. This woman has arranged to have her child's classroom aide to take him home with her one night per week and one weekend per month. "She does a quality job," said the mother. "Now [the child] gets more entertainment and exercise." This mother has also used funds to hire the children of her friends to care for the child. "It's nice to have that flexibility," she said.

- A family living in the remote southern part of Dakota County often had trouble with providers who would not be available to them if the weather got bad. "It was hard to keep consistency," according to the mother. When the father's

younger

brother moved to the area, the couple was able to hire him to provide respite care for their 16 year old son. "At his age, community and leisure things are getting to be more important," said the mother. The father's brother brings enthusiasm, commitment, and best of all, continuity to the job.

2. Use of different patterns of service.

Based on complaints to county staff before the project began, project staff speculated that participants would use respite care at different times than they had before. For example, some families had complained that they needed respite care on week nights, but could only get it from county contractors on weekends.

This outcome proved to be too difficult to measure. Project staff believe, however, that it was achieved based on anecdotal reports. Nearly every person interviewed for this report came up with the same word to describe the project: flexibility. Based on these interviews, it appears that families were able to get respite care when they needed it, not just when it was available.

3. Higher levels of satisfaction.

One criterion for choosing families for the project had to do with their level of satisfaction with the way things were

operating for their families before the project. Those who indicated dissatisfaction were selected for participation.

The best indicator of satisfaction with the project is the fact that all of the families plan to continue managing their own accounts as the project grows out of its experimental status and into **business as usual**. The words of families best describe how they feel about the project.

- "I liked the project," said one woman, the mother of a 29 year old with disabilities. "For the first time we had money to get out and do a few things with [the daughter]."
- One mother said that respite from her adult daughter was the biggest need, and that she and her husband were successful in arranging it. "We've gotten much more respite than ever...it allowed us to keep up with her..." She also said that the flexibility of the funds allowed her to find a provider who can come in the evenings and weekends - "it's kept our [woman and her husband] relationship going."
- One family reported that they "loved the project...We were able to buy things that were our dreams."
- The mother with seven children were happy to be "able to use people I can depend on and trust. I have no worries about staff turnover."
- "We are getting [young daughter] out of her shell," said one mother. The family spent much of its funds on goods rather than services, a luxury according to the mother who said the family was "so used to just getting by. Then all of a sudden we realized that our child was getting the shaft. This year has been a big plus."
- One participant who is very used to, in her words, "manipulating" the system, was pleased that she and her husband had "freedom to make decisions [for their child] on our own without begging."
- Consistency in a respite provider was most important to one family. Their 16 year old son, the mother reports, does well when respite is predictable. They've had trouble with personnel changes and interruptions -- all of which make it hard to "keep him going."

4. Enhancements in lives

All of the families interviewed for this report were able to cite examples of how the account management project

has enhanced the lives of their families. Generally speaking, these enhancements were stated in terms of a purchase or a respite care arrangement. Even when not stated directly, it might reasonably be assumed that these enhancements were resolutions to long standing problems.

- One couple was pleased they were "able to get out more."
- "The ramp changed [daughter's] life. It's easier on us - we also have a new baby - to get her ready," said a mother. This family also used funds to buy an adapted swing and tabletop for her - both of which came in handy when they threw a neighborhood birthday party for her. The mother saw the party as a seminal event in her child's life, as well as in the lives of her neighbors. "They [children and their parents] got to see that she's normal. She likes the same things you do."
- A family used funds to purchase a video camera which they used both at home and at school, with their family and with their daughter's classmates, to trade stories and experiences with the child. "The kids are so interested in her. It is a nice way for her to communicate," said her mother. "The kids love her."
- The family with seven children had been limited in the kinds of things they could do as a family. According to the mother, the funds from the project allowed them to get out together. It also allowed the couple to take some time for themselves.
- One mother of a young girl admitted she didn't know how isolated she was until she got involved in the project. "It was good to say 'you have to [go to the project sponsored training sessions]' ...it was really easy to just say we have enough problems of our own. If it wasn't for the training ...I wouldn't have gotten involved with stuff like PACER...the best thing that's ever happened. New friends, new people...I'm learning how to get involved..." This mother is also happy with her daughter's progress since she purchased a supine stander. "She's so tall and wonderful! She stands for a half-hour. It makes her feel more normal!" The woman also credits the funds from the project with allowing her and her husband to go away for a weekend. "It was wonderful," she said.
- One parent may be changing her local school system with her purchases of computer software. "It's great. I took software to school and said 'here,

school," she said, and school personnel were receptive. This family spends much time planning for their child's future, said the mother, and the project helped them further their plan. They are building a caretaker's quarters and a computer center - piecemeal - with the funds. "We don't live day to day. We won't need a group home because we are developing our home for our child," she said. The woman also used the funds to hire a respite provider so she could finally consider going back to work.

- One participant who's been in the project for two years took a philosophical stand on how the project has affected her family's life. "The privilege of making our own choices has made me feel like we're functioning more as a team." But she may also be experiencing some of the wear and tear of those choices - "I expect the people I deal with, that we cooperate. Too many people are dropping the ball lately. People seem to think that since I've handled so much, I can handle more."
- One family of a teenager said that the project has made the decision to place their child "less immediate."

B. PARTICIPANT TRAININGS

There were two parts to training in the account management project: trainings sponsored by the project and put on with D.D. Council funds, and those families arranged themselves using their \$150 discretionary training D.D. Council funds.

1. Project sponsored sessions

Project staff received \$9,100 to put on trainings for the families in the project and ending up spending \$10,362, a difference of \$1262.

The single largest training expenditure came this fall with a weekend retreat for all families (parents and children) at Cragun's resort near Brainerd, MN. And though all families were made aware of the event and the fact that the project would be picking up the tab, only 15 of the 25 families attended. Those who declined to attend cited schedule problems, transportation problems, and fear of being away from known medical care networks.

The retreat was successful according to those who attended. It featured several speakers and workshops, including one by County staff to discuss the future of the project.

Aside from the content of any of the sessions sponsored by the project, participants were pleased with the interaction with each other.

- "It was great to be with other parents," said one mother. "But I felt like the first year people had something going with each other that we [those new to the project in the second year] didn't."
- "Overall they were pretty good. I liked getting ideas from other parents," said another mother.
- "I found out from fellow voucher [account management] parents about my own power...what I could get the system to do," reported a parent. "I would have liked more time with them."
- One mother, who is very experienced, said she "wasn't impressed" with the sessions.

Project participants could be broken down along several lines:

those who were system veterans vs those who had never been activists;

those who were in the project for two years vs those who were new to the project in the second year

those with young children vs those with children age 16 and older

These fairly disparate groups had different interests. It was difficult to find trainings which would interest more than a handful of people. On the other hand, just getting the families together in the same room seemed to be one of the highlights of the project.

2. Individual trainings

Families clearly valued the \$150 discretionary training funds, though only 59% (\$2199 of the budgeted \$3750) of that fund was spent. Funds were used for association memberships (i.e. ARC Suburban); workshops and conferences on specific disabilities. One woman used the funds to defray the cost of her Nurses Aide training at Inver Hills Community College. Two of the families whose children will soon be transitioning out of school used the funds for workshops on planning for the changes. Overall, it seems that families who had been in the project in the first year spend more of their funds than the new families. This may be due to a combination of two things: their own experience and the experience of the social worker who also happened to be the

project's lead worker. (Project staff have contacted the D.D Council staff about using remaining grant funds to provide training opportunities for families who choose account management as Dakota County makes the option widely available in 1992.)

C. YEAR TWO EXPANSION; IMPLICATIONS

Year two of the account management project featured three major differences from the first year, each with implications.

1. Project size doubled from 12 to 25 families. When the project was small, problems and solutions were easy to implement because the number of moving parts was manageable. Once the number of participants doubled, however, it became much more difficult to "wing it." For example, meeting dates had to be set far in advance to accommodate so many schedules. And even when schedules could be coordinated, meeting topics were not of universal interest. The size of the project and the fairly rigid timelines also cut down on the ability of the families to make connections with each other, something many of the families lamented.
2. Project included families whose members with disabilities were over age 18 for the first time in year two. One of the most interesting possibilities for family account management has to do with this population. For many, these are years of transitioning out of school and into self-sufficiency. For others it means aging parents planning for the time when they are unable to care for their family members. This group probably could have used more training on those topics, though such training was not of interest to the bulk of the families.

Project staff asked ARC Suburban to work with this group by putting on a self-advocacy workshop. The workshop never happened, first because of weather, later because there was no interest.

3. Project included eight social workers in year two in addition to the social worker from the first year. While this helped move the project from its experimental status to business as usual, there was also a noticeable loss of energy and focus with this diffusion. Some social workers were more excited about the project than others. One social worker who

had one family in it thought the project only serves to exacerbate the disparity between the haves and the have-nots. "It's too wide-open for people to choose how to spend the money," he said. "This just makes it worse for those who can't get respite money." On the other hand, another social worker said "I love it for my really capable people...It's a lot less work for me as the social worker to find providers. The respite flexibility is great." She believes that the involvement in the project helped one single mother who was inexperienced and to date uninvolved in the system. "She used to call me every day," said this social worker. "Now she's taken control. She doesn't call me anymore."

This diffusion, the larger size of the project and the busy lives of the participating families may also account for the fact that both the journal payment budget and the individual training budget were underspend. The individual training numbers are reviewed above, section B2. The journal payments (recall that each family was to receive \$15 for each monthly journal and expense report submitted) totaled only \$3150 or 70% of the \$4500 budgeted.

D. ADVISORY COMMITTEE

Project staff hoped that the advisory committee, which was weak in year one, would be strengthened by the addition of several family representatives. Staff also hoped that the group would willing to help organize training efforts, and contribute to the project newsletter. It's fair to conclude that the outcomes for the group were mixed. On the positive side:

- Representatives of four to five families attended each of the three meetings, quite a coup considering the complexity of their lives. From this group came the ideas for the "Day at the Zoo," and the weekend retreat at Cragun's.
- Upon the suggestion of the D.D. Council, families took turns chairing the meetings. Project staff worked with each chair to prepare agendas and support documents. This arrangement gave families an even greater sense that this was their project.

Ultimately, however, the expectations for the committee proved to be too high. On the negative side:

- Some members of the committee were not able to make any of the meetings. The project would

G. LEGISLATION

The biggest potential for trouble is, as it was in the first year of the project, the County's liability for worker's compensation and unemployment claims for people who are employed in the homes of participants. As the reader may know, Minn. Stat. 268.04, subd. 9 says, "Any private or nonprofit or government agency providing or authorizing the hiring of homeworkers, personal care attendants, or other individuals performing similar services in the private home of any individual is the employing unit..." Despite the fact that the locus of control of an employee in this project is with the participants and **not** with Dakota County, the law would define the county as the employer.

This law not only presents the potential for large monetary claims against Dakota County, it may also have a chilling effect on the wider implementation of the project. Dakota County's 1991 legislative package included a revision of the legislation, but it went nowhere. The change will also be part of the 1992 packet. (See ATTACHMENT F - a copy of the proposed legislation.) *

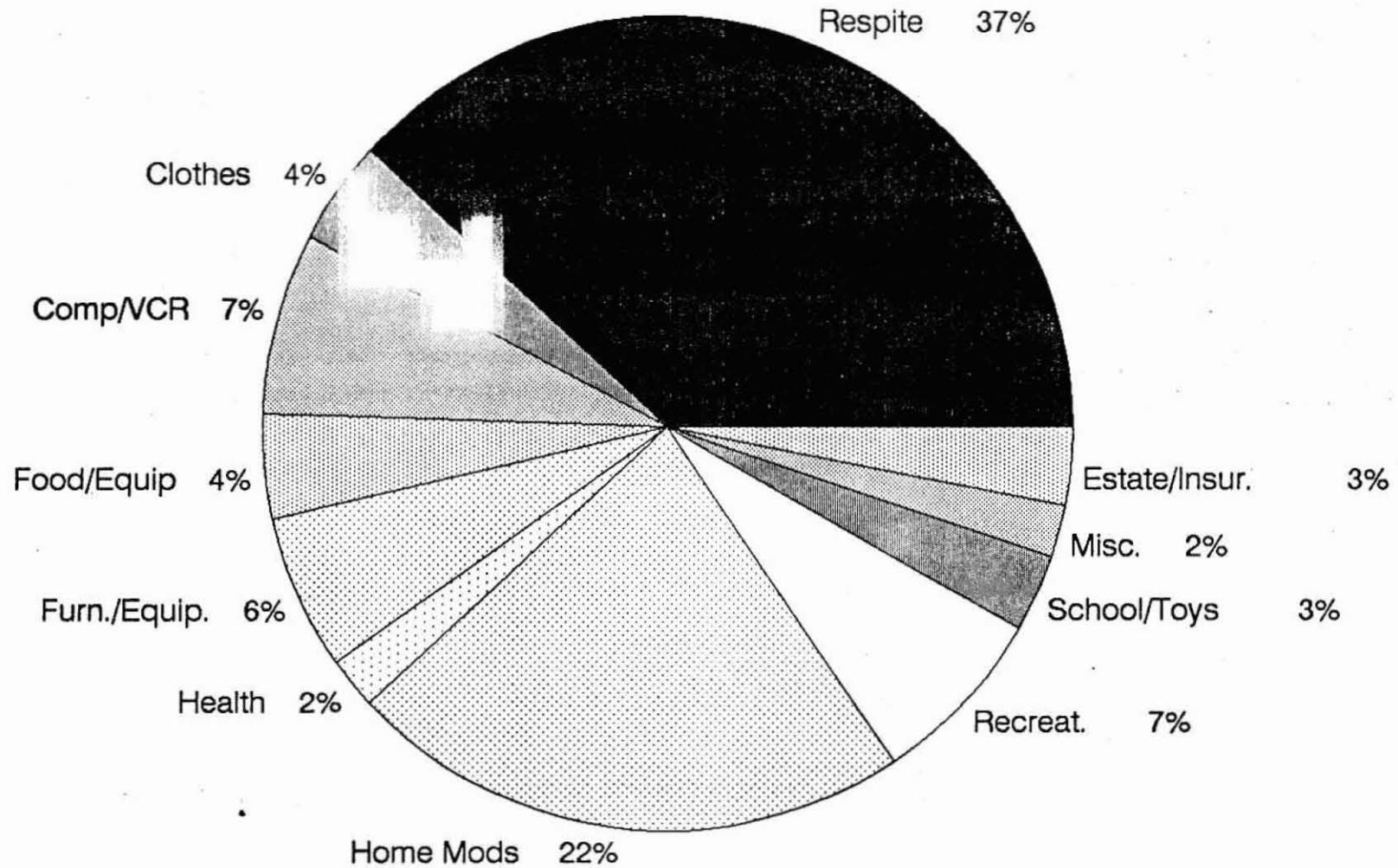
H. FUTURE OF **THE** PROJECT

Dakota County plans to make account management an option for all families for whom county funds have been approved. Attachment G is the Draft program policy.

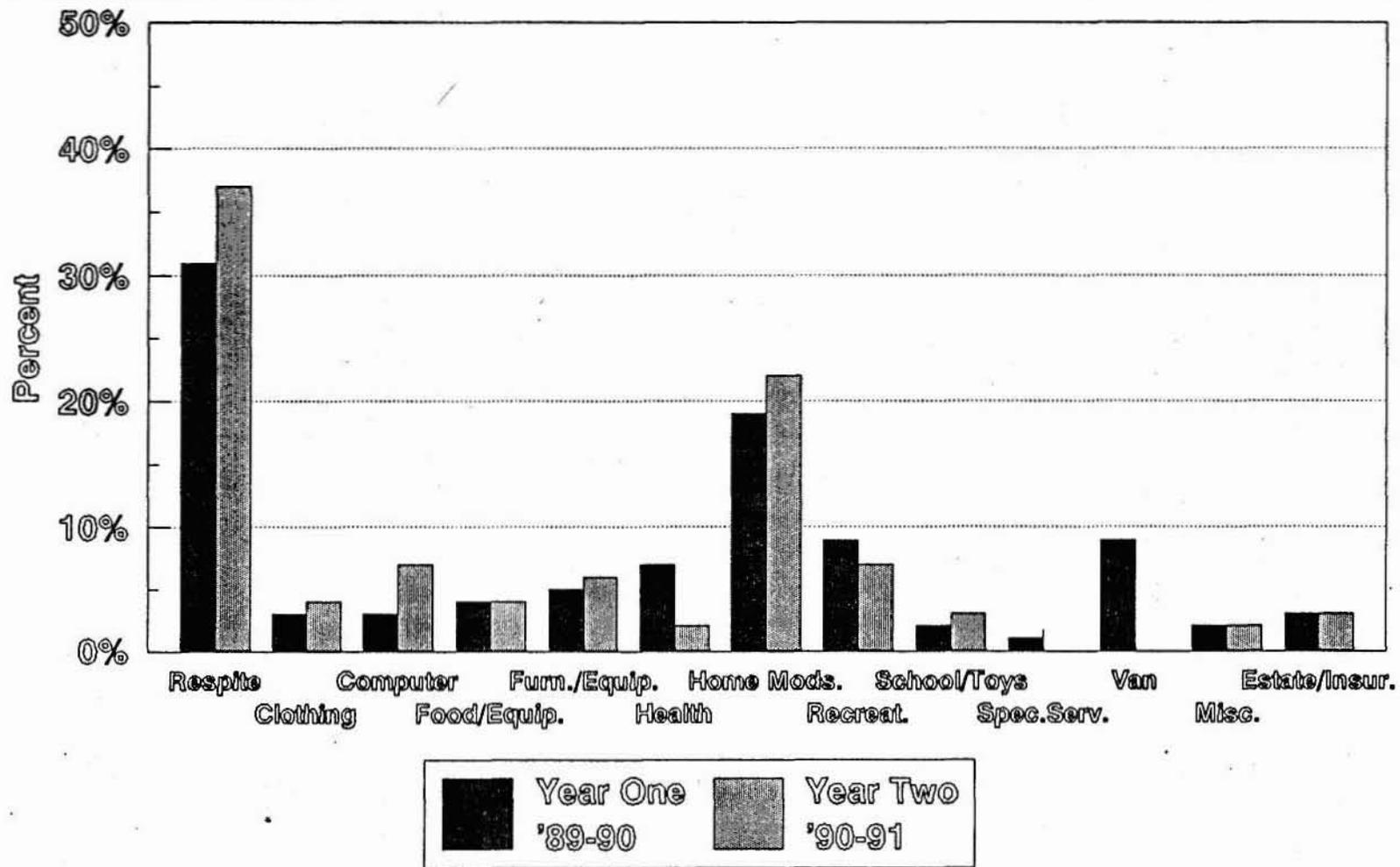
ATTACHMENT A:

BREAKDOWN OF EXPENDITURES

Year Two Expenditures by Category



Comparison of Expenditure Ratios by Category Year One and Year Two



ATTACHMENT B:

ADVISORY COMMITTEE CHARGE AND MEMBERSHIP

**DAKOTA COUNTY VOUCHER PILOT PROJECT
ADVISORY COMMITTEE CHARGE AND MEMBERSHIP
October 1990**

CHARGE: To advise Dakota County staff on the implementation and evaluation of the Voucher Pilot Project. The committee will help define parameters for the Project by:

- o Reviewing and making recommendations on whether to fund those goods/services which do not, in the view of the Project social work, seem to fit the Project's funding parameters
- o Providing ideas for alternatives to proposed expenditures which are outside of the Project Parameters
- o Reviewing interim and final reports
- o Propose ideas for participant training
- o Advise on other project-related concerns as appropriate

MEMBERSHIP: Original plans for membership included representation from among participating families and from the pool of "alternative providers" expected to materialize because of the project. As it turns out, however, it may be not only impossible to convince these people to add these meetings to their schedules, but it may also be inappropriate when individual service expenditures and preliminary plans are being considered. We may explore a kind of ad hoc membership for representatives of these groups.

As of October 1990, this is the advisory group membership:

Learning Disabilities - Minnesota - Joyce Lang
Human Services Advisory Committee - Mike Hughes
PACER - Cece Shapland
Dakota County - Howard Schneider
Parent - Waliya Flowers
Parent - Lynn Gillies
Parent - Steve Susag

Committee staff are Lura Jackson (project social worker) and Meg Grove (project planner/grant administrator).

**MEETING NOTICE - DAKOTA COUNTY
VOUCHER ADVISORY COMMITTEE**

**You'll recall that at the last meeting of
the Dakota County Voucher Advisory Committee
we scheduled our next meeting. It will be
held:**

**Friday, July 19, 1991
1:00 PM
Northern Service Center
(Wentworth Building)
33 East Wentworth, W. St. Paul
Room 315**

A tentative agenda includes:

- Review of 3rd quarter of project (see attached)**
- Plans for 4th quarter of project**
- Plans for "life after the project"**
- Plans for an early fall retreat for
all participants**
- Other things you'd like to add
(Call me at 450-2809 to get things on
the agenda)**

See you on the 19th!

Voucher Advisory Committee
Year 2

Howard Schneider
Dakota County Planning

Lura Jackson
Dakota County Social Services

Cece Shapland*
PACER Center
4826 Chicago Ave. S.
Minneapolis MN 55417
827-2966

Mike Hughes**
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Joyce Lang
Learning Disabilities of MN
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(W) 544-0315

Bill Meyer
4289 Braddock Trail
Eagan MN 55123
(H) 454-0472
(W) 293-3138

* you spoke
w/ him

* Removed self from committee because of other commitments

** Dakota County Humans Services Advisory Committee liaison

ATTACHMENT C:

"GETTING THE WORD OUT" MATERIALS

POS - VOUCHER COMPARISON

	CURRENT POS SYSTEM	VOUCHER/ ACCT MGMT SYSTEM
Find, contract w/ providers	Social Worker	Family
Types of providers	County contract agencies for respite or child care	Family, friends or neighbors for respite, child care, tutoring, in- home support
Purchase of goods	One time expenses under certain conditions	Few limitations

ITEMS

Weekly dinners at McDonalds

Weekend at St. Paul Radisson

Instant camera

Sewer service

Encyclopedia

Television

Mickey Mouse furniture

Storage shed

Long distance phone calls

Computer repair

Radio antenna

Health club membership

Deck swing

File cabinet and system

Walkman radio

Home waterproofing

Swimming lessons

Shaklee vitamins

Chiropractor (for parent)

Family counseling

Carpet cleaning

Bike helmet

Summer camp

Estate planning

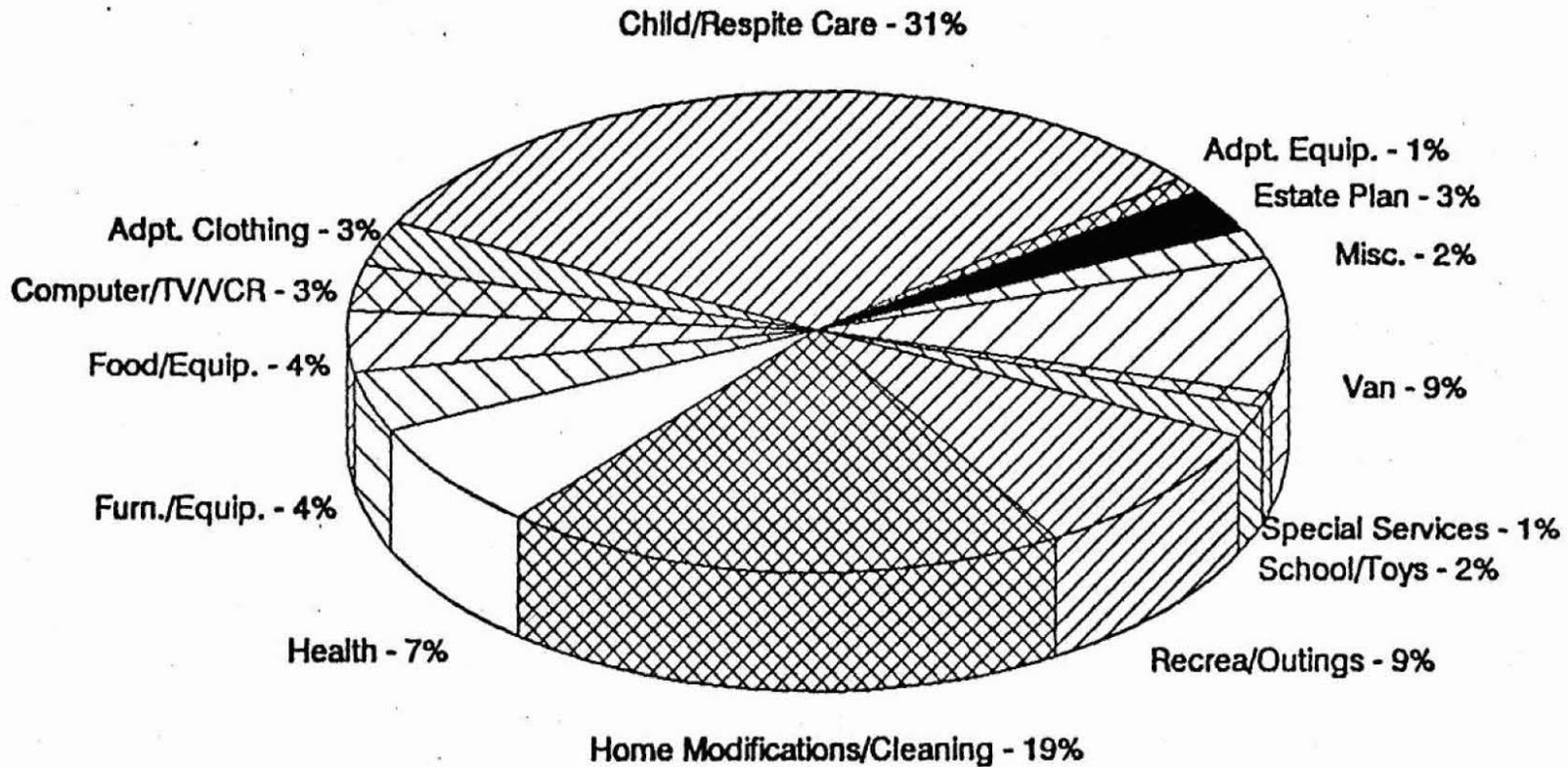
PROJECT HYPOTHESES

1. Will participants use a larger number of alternative or informal providers for child and respite care?
2. Will participants be more satisfied with their service provider arrangements?
3. Will participants use funds for goods and services not traditionally funded by County, and which reinforce family coping skills?

DAKOTA COUNTY ACCOUNT MANAGEMENT PROJECT PLAYERS AND RESPONSIBILITIES

	Research potential for project	Develop project, proposal	Develop policies, forms	Recruit, select participants	Critique	Sit on Ad. Comm.	Fund project	Set up, run training	Create ex-pend. plans, monitor	Recruit,hire monitor, pay providers	Evaluate, report on project	Trouble-shoot
Families					X	X			X	X		X
Social Workers	X	X	X	X		X			X-monitor only			X
D.D. Council							X					
County Admin.	X	X	X	X		X		X			X	X
ARC-Suburban	X-Parent Case Mgr.				X	X		X by contract				
Advisory Committee					X							
County Board					X		X					

VOUCHER PROJECT SUMMARY OF YEAR ONE EXPENDITURES



#2

**DAKOTA COUNTY ACCOUNT MANAGEMENT PROJECT
KEY POINTS**

1. Families can successfully manage own services, providers, purchases, bill paying.

2. Despite this statement, the project is not appropriate for everyone.

3. Even if families are appropriate for account management, you cannot assume they all have strong personnel and financial management skills. In order to maximize families' chances for success, you should provide those tools and skills.

4. Encourage networking among the families.

5. Some form of recordkeeping is necessary for accountability purposes. The accountability is not necessarily directed at the participating families, but at the public.

6. You will not always be comfortable with the spending decisions participating families make.

7. Liability issues and extremely cautious attorneys can stifle the project.

RESPONSIBILITIES OF PARTICIPANTS

- o **Arrange for service purchase, delivery, payment**
- o **Monitor quality, do own problem-solving**
- o **Adhere to Expenditures Guidelines**
- o **Prepare and get approval for Preliminary Annual Expenditure Plan**
- o **Submit monthly journals, expenditure and training reports**
- o **Complete 40 hours of training**
- o **Keep lines of communication open with social worker**

ACCOUNT MANAGEMENT GUIDELINES

1. Expenditures must be directly related to the individual's disability.
2. Funds cannot be used to pay TEFRA fees.
3. Up to 20% of funds can be used on outings, meals, recreation.
4. Funds must be immediately available.
5. Social Worker must approve Preliminary Annual Expenditure Plan

MONTHLY REPORTING REQUIREMENTS

o JOURNALS answer these questions:

- Who provided services?
- What were the services?
- What was your biggest problem?
- What was your biggest success?
- How have things changed?

o TRAINING REPORTS answer these questions:

- What was the training?
- What was its impact?
- How many hours?

o EXPENDITURE REPORTS answer these questions:

- What was purchased?
- How much did it cost?
- How did you pay for it?

PRELIMINARY ANNUAL EXPENDITURE PLAN

1. Must be completed by all participants.

2. Due by January 1, 1991.

3. Outline of planned expenditures.

4. Describe fund distribution.

ATTACHMENT D:

MINNEAPOLIS STAR TRIBUNE ARTICLE

Families (1) of disabled children get direct aid

By Pat Prince
Staff Writer

For Linda Rother, the last straw came when she arrived home from work and found that her three children had torn the house apart, cut off their dolls' hair and squashed peanut butter and jelly sandwiches into the carpet.

The personal care attendant hired by Dakota County to look after her two developmentally disabled children — for \$30 an hour — sat on the sofa watching soap operas.

So Rother was an eager participant two years ago when Dakota County started giving money directly to parents of developmentally disabled children, allowing the parents to choose which services or equipment to buy. Now Rother pays neighborhood teenagers \$5 an hour to play with her kids.

For 25 families in the program, the county money also has paid for family vacations, special toys, wheelchair ramps, housecleaning service, van payments, music lessons and summer camp.

Last week, the Ramsey County Board authorized its Human Services Department to develop a similar program. If approved by the state, the direct grants would be available to all 190 county families now receiving assistance for developmentally disabled children.

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Hennepin County is working on its own version — which would probably involve a small sample of families — as are a few other counties.

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A state law permits up to 10 counties to try new approaches to case management for families with children with developmental disabilities. It's part of the trend away from institutionalizing those children, officials said.

The idea is that families know better

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STAR TREASURE 9/20/91

Program Continued from page 1B

than bureaucrats or social workers what services they need in order to keep their children at home.

"It's been a fantastic success," said Milt Conrath, who manages the developmental disabilities division of Dakota County Human Services Department. The option may be available to all families receiving such funds next year, he said.

The Dakota County program showed that families stretch their allotments through informal arrangements with neighbors, friends and families, while agents of the county must abide by strict state regulations that require the use of licensed vendors and severely limit how money may be used.

Administrative costs and hassles also waste money that could be used more efficiently by the families, said Bill Barrett, who manages Ramsey County's children's developmental disabilities division.

"The rules just keep getting in the way," he said. "We want to give parents a message: 'You know what's good for your child. Do it.'"

Dorothy Skarnulis, executive director of Arc Ramsey County, recommended the direct-grant plan to the county. Arc Minnesota, the state chapter of a national advocacy group for people with mental retardation and other disabilities, lobbied for the state enabling law.

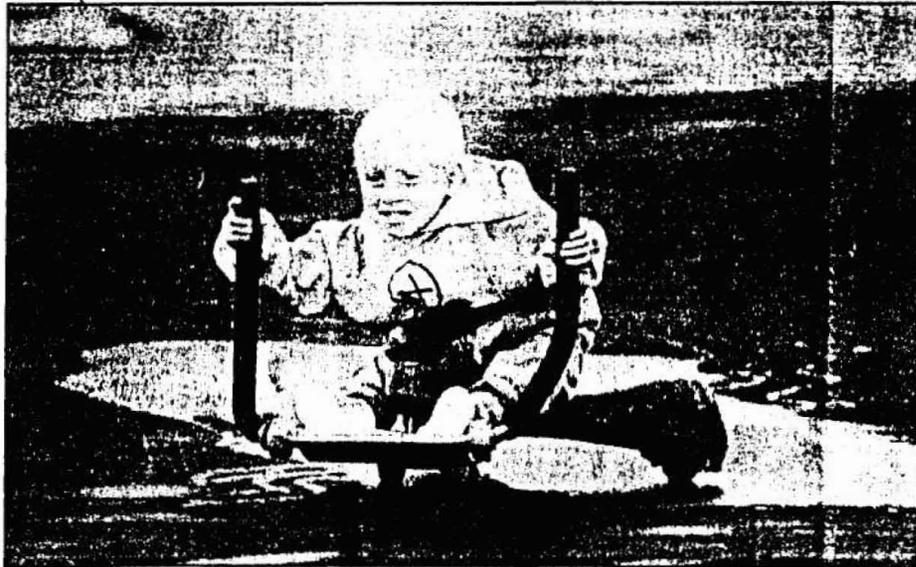
While Dakota County required families to submit budgets up front — a model Hennepin intends to follow — Ramsey County will require an annual accounting to allow more flexibility, Barrett said.

Dakota County officials say there have been no reports of abuses by parents, who receive training in bookkeeping and other skills. Critics might ask whether public money should go for such things as vacations, health club memberships and maid service, but Ramsey County's director of social services defends such choices.

"What I see the money buying is whatever it takes for a particular family to continue to have the strength to continue to keep a very difficult child in their home," Dave May said. "The public has to decide whether it's a good expenditure... to keep a child (at) home rather than putting him in foster care."

If the state accepts Ramsey's proposal, the county plans to offer families who have placed developmentally disabled children in foster care the chance to take the children back and get the money that would have gone to the foster parents. That could be \$10,620 a year for children with developmental disabilities.

Because placing a child in foster care is such a difficult and complex decision for parents, May doesn't expect many to reverse that decision at first.



Staff Photo by Jerry Holt

Direct aid from Dakota County allowed Ken and Lynn Gillies to buy a special cart for their disabled son B.J., 3.

But through the new program, officials expect to learn what support parents need to avoid choosing foster care in the first place, he said.

Paula Reeves said that she and her husband, Mark, would not have been able to keep Robbie, their ward, at home without the flexibility of Dakota County's program. Robbie, 21, has

profound mental retardation, uses a wheelchair and is a "total-care kid," she said.

When the county used to arrange for services for the Lakeville family, there was regular turnover among caretakers, who usually had little information about Robbie's disabilities and needs. With the pilot pro-

gram, the parents were able to hire a caretaker directly.

The caretaker had worked for the agency that contracted with the county. The county had paid the agency \$15 an hour, with \$6 going to the caretaker. The Reeves pay him \$8 an hour. He and his family take Robbie every weekend.

"It's so nice for him to have other people in his life who really care about him," said Reeves. "We can enjoy him more. You don't get tired just doing the care stuff."

Once a week, she and her husband even sneak off for a date — leaving their six other children with a family friend, whom they also pay with county money.

Lynn Gillies, of Egan, said that she and her husband, Ken, couldn't have come up with the \$250 for the special hand-propelled, four-wheeled cart that enables their 3-year-old son, B.J., to play outside "just like any other kid on the block."

The toddler was born with spina bifida and has related disabilities. He has no motor control below his waist.

The family also used part of their \$5,400 a year to attend a conference on spina bifida in Philadelphia and to hire someone to care for B.J. one night a month so they can spend that time exclusively with their other son, 10-year-old Seth.

Lura Jackson, the lead social worker for the Dakota County project, said the new system made her job easier, freeing her from having to settle disputes between families and people hired by the county. "My job became a lot more rewarding, too, because I saw a lot more good stuff happening with the families than would have happened with the regular system," she said.

Arc Suburban

SEP

Advocacy
and support
for people
with
developmental
disabilities
and their
families

To: Voucher Retreat Participants

From: Celeste

Date: September 20, 1991

Hi Everyone. I think I have a general idea now of what things are going to look like for the voucher retreat. Arrival will be Friday night somewhere before 8:00p.m. hopefully. I asked for a meeting room from 8:00p.m. to 9:00p.m. so that everyone would get a chance to meet. After that you're on your own. I will see about getting a separate meeting room for the kids where they can have a video and popcorn or something.

On Saturday we have arranged for Camp Confidence to provide activities for all of the kids. It's about one mile down the road. We have arranged for the kids to be there from 9:00a.m.-3:00p.m. While they are there we will have a workshop from 9:00a.m. to 11:00a.m. and one from 1:00p.m. to 3:00p.m. We will have to transport the kids but with the adults we have coming up to assist that should be no problem. (If this arrangement is not suitable for your child/children please let me know and we will try to arrange something at the lodge.) After 3:00p.m. you are on your own.

On Sunday from 10:00a.m.-11:00a.m. we will have Susan Hanson talk to us about the future of the voucher project.(what it will look like, how it will work, etc.)

The meal schedule looks like this:

Saturday: Breakfast buffet from 7:00a.m.-8:30a.m.
Dinner from 6:30p.m.-8:00p.m.
Sunday: Brunch from 8:30a.m.-10:00a.m.

Kids will have a cookout at camp confidence for lunch on Saturday. I'm not sure what we will be doing for the adults in the group. There are refrigerators in the rooms so feel free to bring up any food or drink.

Serving Dakota, Scott and South Washington Counties

15025 Glacier Avenue

Suite 230

Apple Valley, MN 55124-6300

612-431-3700

Arc Suburban

Advocacy
and support
for people
with
developmental
disabilities
and their
families

To: All of you wonderful families who will be going on the fun filled, exciting, relaxing, anything you want to make of it, voucher retreat.

From: Celeste

Date: 18 days before the fun filled, exciting, relaxing, anything you want to make of it, voucher retreat.

Just sending you a little something to remind you that the weekend of the 4,5, and 6 of October is coming around and you are hopefully still committed to spending it at Cragun's Resort. I am enclosing a list of the names of the families who have said they will be attending. Please check out the information I have for your family and call me if I have anything missing or incorrect.

I will be sending out an agenda of sorts for the week-end. But that will not be finalized for another week. Call if you have any questions. I look forward to seeing everyone at Cragun's.

Serving Dakota, Scott and South Washington Counties

15025 Glazier Avenue

Suite 230

Apple Valley, MN 55124-6300

612 431-3700

Arc Suburban

Advocacy
and support
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developmental
disabilities
and their
families

To: Voucher Project Participants

From: Celeste denDaas

Date: October 23, 1991

Enclosed is one of the last packets of information that I will be sending. Hopefully this will lessen the clutter on your kitchen counters.

To those of you who were at the retreat at Cragun's I thank you for coming. I've heard from a few who really enjoyed their time there. I hope it was a positive experience for everyone. If anyone has any feedback on the information that Susan Hanson presented please let me know. Marianne and I will be meeting with Milt Conrath and Susan Hanson to talk about the new guidelines on Monday.

Have a great day.

Serving Dakota, Scott and South Washington Counties

15025 Glacier Avenue

Suite 230

Apple Valley, MN 55124-6300

612-431-3700

What are Sibling Saturdays ?

Children who have siblings with developmental disabilities sometimes feel confused about their emotions. They may feel isolated and believe that no one understands them.

Now, elementary-age children who have brothers and sisters with developmental disabilities are invited to join other siblings for Sibling Saturdays at Eden Wood Camp. Kids will share fun, feelings, and friendship while exchanging stories and playing games. Other activities include arts and crafts, hiking, and outdoor sports.

Sibling Saturdays, cosponsored by Arc of Hennepin County and West Hennepin Community Services, are designed to help children feel good about themselves and their families. Participants will find out that they are not alone, and that other people do understand their feelings.

**Sibling Saturdays will be held on the third Saturday of each month
from 10:00 a.m. to 3:00 p.m.**

1991: Sept. 21, Oct. 19, Dec. 21

1992: Jan. 18, Feb. 15, Apr. 18, May 16, June 20, July 18, and Aug. 15

Each Sibling Saturday costs \$7.00 (\$8 for nonmembers); a series of four Saturdays costs \$25 (\$29). Kids should bring bag lunches, swimsuits, and, in winter, warm outdoor clothes and boots. We need a minimum of six participants each time, so reservations must be received ten days in advance of each session. Call Jean Lauer at 920-0855.

Directions to Eden Wood: Take Highway 169 South to 62 West. Cross two sets of railroad tracks, then turn left on Indian Chief Road (approximately one mile past 494). Turn right into the camp (before the railroad bridge) and go all the way up the road, parking at the bottom of the hill from our buildings.

Sibling Retreat Weekends! Eden Wood's sibling retreat weekends are for kids ages five to eleven who have brothers and sisters with developmental disabilities. The retreats give participants a chance to socialize with other siblings, talk about their feelings and fears, and take part in camping and recreational activities. Sibling retreats cost \$45 and will be held Nov. 1 - 3, 1991, and Mar. 13 - 15, 1992.

Sibling Saturdays and Sibling Retreat Registration

Child's Name _____	Age _____	Sibling Saturdays:
Parent's Name _____		___ Sept. 21 ___ Apr. 18
Address _____		___ Oct. 19 ___ May 16
_____		___ Dec. 21 ___ June 20
_____		___ Jan. 18 ___ July 18
_____		___ Feb. 15 ___ Aug. 15
Phone (day) _____	(eve) _____	Sibling Retreats:
Name of sibling with disability _____	Age _____	___ Nov. 1 - 3, 1991
		___ Mar. 13 - 15, 1992

Please mail this form along with check or money order to: Arc of Hennepin County,
Diamond Hill Center, Suite 140, 4301 Highway 7, Minneapolis, MN 55416-5810

please post

"Access to Life"



**Living with
a disability**

Dianne B. Piastro

You are invited to hear

**Dianne B.
Piastro**

Star Tribune Columnist

Saturday, November 9, 1991

11:30 AM

Sheraton Park Place

I-394 at Vernon

Reception 12:30 PM

This program is free and open to the public

Sponsored by the Minnesota Multiple Sclerosis Society



For more information, contact Colleen O'Fallon at the MS Society
870-1500 (metro) or 1-800-582-5296 (toll-free)

OCT 10 1991

OCT 21 1991

UNITED CEREBRAL PALSY OF MINNESOTA
and
THE MINNESOTA STATE COUNCIL ON DISABILITY

Present
An Audio Teleconference on

**Leadership Development
Mentoring--A Model for Success**

Two UCPA National Demonstration projects, **Project Mentor** and **Pathways to Independence**, use a "peer/mentor" approach to expand access to and use of assistive technology for persons with severe disabilities. In each project, a person with disabilities is paired with another who is more experienced in using assistive technology and who shares that knowledge in order to increase the peer's independence and employability.

In this teleconference, people with disabilities will talk about their experiences with mentoring and how this approach has empowered them to find jobs in the community, live more independently and participate in the decision-making process in the agencies and organizations that affect their lives.

Robert Watson, Project Director of **Pathways to Independence**, will introduce the concept of mentoring and how it has empowered people with disabilities to access assistive technology, live independently, find meaningful competitive employment, and increase their participation as leaders, board members, advocates and activists in their local communities. His presentation will include specific "how-tos" for incorporating mentoring into adult programs and will be followed by a panel discussion featuring three participants from **Pathways to Independence**. These men and women will highlight what they've learned and accomplished over the past year as peers and mentors.

The UCPA **Leadership Development Training Program** also uses a mentor approach to the empowerment of persons with disabilities. **June Kailes**, who has spent the past two years piloting this program throughout the United States, is presently writing a UCPA Leadership Training Manual (available late Fall 1991). She will present highlights from that manual, including information on securing funding for leadership development programs that use a peer/mentor approach.

A 20-minute question and answer period will allow teleconference participants to talk with all five presenters.

WHO: Persons with disabilities, Parents, Professionals, Volunteers, Staff

WHAT: Through a combination of slides, hand-cuts and mini-case studies, teleconference participants will acquire hands-on information about the possibilities inherent in mentoring, the benefits such a program can have, and practical advice on developing a mentoring program.

WHEN: Wednesday, October 30, 1991

TIME: 12:45 p.m. to 2:30 p.m.

WHERE: Radisson Hotel St. Paul, 11 East Kellogg Blvd., St. Paul, Minnesota

COST: The teleconference is offered as a public service by UCPM, Minnesota State Council on Disability, and Radisson Hotel St. Paul.

Pre-registration for the teleconference is necessary in order to assure each participant receives a set of hand-outs. Reservations must be made no later than **October 28th** by calling UCPM at 612-646-7588 or toll free at 1-800-328-4827, ext. 1437.

Human Service Associates

RESPITE CARE SERVICES

PURPOSE: Respite is a period of rest or relief available 24 hours per day. It provides a temporary break from the daily challenges of caring for a disabled family member or foster child. Families may use respite care for illness, emergencies, free time for primary caregiver, and/or time for the needs of other family members.

REFERRALS ACCEPTED FROM BOTH FAMILIES AND PUBLIC SERVICE ORGANIZATIONS

SERVICES PROVIDED: The HSA Respite Care Services program is designed to provide a safe, supportive environment for children and youth while providing a resource for respite by the primary caregiver. The HSA Respite Care Services program is coordinated by a designated respite coordinator and maintains the following:

- ▶ licensed, trained and supervised care providers
- ▶ ongoing, regularly-scheduled respite arrangements
- ▶ half-day care arrangements available (up to 8 hours)
- ▶ transportation may be negotiable
- ▶ preplacement interview at the provider's home
- ▶ care plan
- ▶ professional consultation available to the provider around the clock

PROGRAM STAFFING: The placement team consists of the HSA social worker, the biological family and the respite providers. The team develops the appropriate respite plan for the family; the HSA social worker coordinates the team and supervises the delivery of respite services.

REFERRAL PROCESS: Referrals are made through our regular intake procedure. Please call the HSA office at (612) 645-0688 and a social worker will talk with you about the needs of the individual child and the resources of HSA to meet those needs. If a match seems likely, the respite coordinator will facilitate planning and placement.

FEES: Our daily respite care rate is \$67.60; the half day rate is \$33.80.





Family Day 1991

WE'RE ALL IN THIS TOGETHER !

An event for people with developmental disabilities and their families

Saturday, November 16 9:30 A.M. - 2:30 P.M.
Penumbra Theater, Martin Luther King Center
270 N. Kent, St. Paul

Family Day Lineup

- 9:30 Registration
- 10:00 InterAct Theatre Presents *We're All In This Together*, an inclusive theater production
- 11:00 *Kids and Video Project*, presented by Andy Halper of the University of Minnesota
- 11:30 *What did you think?*--reactions to play and video
- 12:00 Lunch
- 1:00 Family Play--activity choices for the whole family, including New Games, creative expression and movement, parachute fun, and face painting
- 2:00 Circle of Movement--group activity for all, led by David DeBlieck and Luverne Seifert
- 2:20 Evaluations & Goodbyes

Family Day 1991 is sponsored by:

- Arc of Hennepin County
- Arc Anoka
- Arc Minnesota
- Arc Ramsey
- Arc Suburban
- Hopkins School District
- St. David's School
- West Hennepin Community Services

Directions to Martin Luther King Center

Take I-94 to Dale St. Go south to Iglehart; go left on Iglehart to the end of the block. There are two parking lots at the MLK Center. The phone number is 224-4601.

Please register for Family Day 1991 by filling out this form and returning to Arc Hennepin no later than **November 1**.

Names of adults attending: _____

Names and ages of people with disabilities attending:

Names and ages of children attending: _____

Address: _____

Phone: _____

Cost for Family Day (lunch is included in all fees)

Arc members: \$8 per person, \$20 for family of three or more
Nonmembers: \$12 per person, \$25 for family of three or more
Partial scholarships are available. For more information, please call Jean Lauer at 920-0855.

I am enclosing \$ _____ for _____ people.

Check here if you need child care for kids age 1 - 3 _____

Names and ages:

(Child care provided for the morning only; families will eat lunch with their children and enjoy afternoon activities together)

Please return this form with your check to: Arc of Hennepin County, 4301 Highway 7, Suite 140, Minneapolis, MN 55416-5810

ATTACHMENT F:

PROPOSED LEGISLATION

A BILL FOR AN ACT
Amending Minn. Stat. § 268.04, subd. 9

TO REMOVE PRIVATE OR NONPROFIT ORGANIZATIONS OF
GOVERNMENT AGENCIES FROM THE DEFINITION OF EMPLOYING
UNIT WHERE THE ONLY ROLE OF SAID ORGANIZATIONS OR
AGENCIES IS PROVIDING FUNDS TO THE RECIPIENT OF HOME
SERVICES TO PAY FOR THE SERVICES

Section 1. Minnesota Statutes 1990 section 268.04, subd. 9, is amended to read:

Any private or nonprofit organization or government agency providing or authorizing the hiring of homeworkers, personal care attendants, or other individuals performing similar services in the private home of any individual is the employing unit of the homemaker, attendant or similar worker whether the agency pays the employee directly or indirectly or provides except where the role of the private or nonprofit organization or government agency is limited to provides providing funds to the recipient of the services to pay for the services.

ATTACHMENT G:

**PROPOSED POLICIES/GUIDELINES FOR "BUSINESS
AS USUAL" IMPLEMENTATION**

D R A F T

ACCOUNT MANAGEMENT POLICY

The goal of the account management funding option is to provide an alternative, flexible funding source to empower individuals and/or families to seek and select community and home support and/or adaptations.

In general account management seeks to:

- o Increase accountability to individuals with developmental disabilities by building community capacity to support these individuals

- o Improve individual planning processes that are based on informed decision making by the individual/family and enable the individual/family to hold the service provider(s) accountable

- o Assure the safety and enhance the independence of the individual

- o Enhance the capacity of the individual's natural support system(s) to meet his/her needs

PARTICIPATION CRITERIA

1. Be a client of DCSS/DD Section and Dakota County financial responsibility.
2. Have County funds approved through the POS committee
3. Meet with the Social Worker and develop a Preliminary Plan for use of funds
4. Attend an Orientation session
5. Have no active involvement from Child Protection or Vulnerable Adult areas
6. Person with disabilities must live with parent or legal guardian
7. Must be willing to comply with program requirements (develop plan, turn in monthly expenditure report, quarterly summary, etc.)

EXPENDITURE GUIDELINES

1. As with all instances of encumbrance of County funds, other financial resources and options should be pursued prior to the use of these funds. Goods and services purchased should be prudent and cost effective.
2. All expenditures are expected to be directly related to the individual's disability. Expenses which would occur regardless of whether there are any disabilities will not be allowed. Consult the Social Worker if there are circumstances which are in question.
3. Account Management funds may not be used to pay life insurance premiums for any member of the family.

4. No Waiver or SILS Services may be funded through this option
5. Account Management funds cannot be used to pay TEFRA, Waiver or County fees. The TEFRA and Waiver programs are federally controlled and the fees have been set in order to have beneficiaries who are able to share in the cost burden of these programs. County fees are set by the County Board and are required for County funded services within established policy.
6. Funds to be used for recreation and leisure activities, family outings, personal improvement, meals, marital dates, etc. cannot exceed 25% of the expenditure plan and must be in the approved plan.
7. Funds must be available as the family need them. Certificates of deposit. Treasury bills/notes and other accounts which tie funds up will not be allowed.
8. Modifications to real property or structural adaptations must be directly related to the disability of the individual being served.

EXPENDITURE REPORTING

Required – minimum of quarterly reports with frequency to be determined as a part of the Preliminary Plan developed with the Social Worker. Note: if reports are 60 or more days overdue no additional funds will be disbursed until these are submitted.

PRELIMINARY PLAN

Required – must be developed with Social Worker before any monies are disbursed and must address frequency of expenditure reporting (minimum quarterly).

PARENT FEES

Same policy as for all other County funded services.

RECEIPT OF FUNDS

Funds may be received in various ways: equal monthly, quarterly or semi-annual payments; periodic reimbursement for actual expenditures; or lump sum.
?(need to limit amount of funds **available in lump sum**)?

UNEXPENDED/UNACCOUNTED FOR MONIES

All funds disbursed must be accounted for before any new or additional monies will be disbursed

Unexpended funds – 3 months will be allowed into a new fiscal or plan year to expend these on approved services or items. If they are still unexpended then monies for the current fiscal/plan year will be reduced by a like amount

Unaccounted funds – must be repaid to the County or expended on approved services/items within 3 months or the approved funds for the next fiscal year will be reduced by a like amount. Other options may be pursued with the County Attorney.

EXITING ACCOUNT MANAGEMENT

Participants may terminate their participation by notifying their Social Worker. Transition time for services and change of funding will be needed and determined on a case by case basis. The County retains the right to rescind this funding option if it has reason to believe that funds are not being used in accordance with the approved plan and general program guidelines Involvement of either Child Protection or Vulnerable Adult issues and personnel will be cause for the County to rescind this option.

TRAINING

Orientation sessions will be held quarterly for new participants or ongoing participants
A periodic newsletter re: training opportunities, policies, resources and items of possible interest will be sent out to individuals using this funding option.

APPEAL RIGHTS

Same as for any other county funded program or service.

ATTACHMENT H

PARTICIPANT SITUATION SUMMARY

DAKOTA COUNTY VOUCHER PARTICIPANTS - YR 2

Situation	Adult #1	Adult #2	Adult #3	Adult #4	Adult #5	
Client Age(s)	28	18	19	20	20	
#, ages other child. at home			Older brother	two- 12, 19	foster care	
Devel. Disab. of child	Severe MR, CP, non-verbal	Moderate MR	Moderate MR	Severe MR, legally blind	Profound MR, non-ambulatory non-verbal	MR
State Asst.	MA, SSI	SSI or RSDI	MA, SSI	MA	MA, SSI, RSDI	
Amt. of Co.Asst (/yr)	\$1,800	\$2,976	\$5,028	\$4,620	\$9,930	
Medical Con- ditions of client		Scoliosis, knee and dental problems		Heart problems, chronic respir. problems		

DAKOTA COUNTY VOUCHER PARTICIPANTS - YR 2

Situation	Child #1	Child #2	Child #3	Child #4	Child #5	Child #6	Child #7	Child #8	Child# 9	Child #10	Child #11
Client Age(s)	11 yrs	7 yrs	13 yrs	14 yrs	2 yrs	2 yrs	13 yrs	11 yrs	11 yrs	9 yrs	6 yrs
#, ages other child. at home	two - 13, 16 yrs	two - 4, 5 yrs	two - 15, 17 yrs	two - 10, 15 yrs	one - 9 yrs	two - 2, 11 yrs	three- 12, 16, 19 yrs	one- 10 yrs	two- 8, 14 yrs (both LD)	one - 3 yrs	eleven - 3-19 yrs, all adopt.
Devel. Disab. of child	Profound MR, CP, non-mobile and non-verbal	Severe MR, CP, non-mobile and non-verbal	Niemann-Pick Disease	Severe MR, epilepsy	Spina bifida	Cornelia DeLange Synd., severe MR	Down Syndrome	Moderate MR	Mild MR	Autism, tuberos sclerosis	CP, MR
State Asst.	TEFRA, Fam.Sub.	TEFRA, Fam. Sub.	TEFRA, Fam. Sub.	TEFRA, Fam.Sub.	TEFRA Fam.Sub.	TEFRA, Fam. Sub.	TEFRA, Fam.Sub.	TEFRA	Fam.Sub.	TEFRA Fam. Sub.	Fam.Sub., Adopt Sub
Amt. of Co.Asst (/yr)	\$12,000	\$2,325	\$6,500	\$7,335	\$5,741	\$4,570	\$4,451	\$1,800	\$2,434	\$12,000	\$6,669
Medical Con- ditions of client	Bowel/ bladder respir. infect.	Respir. infect., vision impair, bowel/ bladder, hydroceph		Severe hearing loss, uncont. seizures, not toilet trained.	Phys.dis. L2 level hydroceph. neurgenic bladder	Hearing impair, trach., gas tube, vent dependent	Hearin/ vision im- pair, orth problems, heart defect	Hearing impair.	Seizure disorder, migranes	Seizures, asthma/ allergies	Non-mobile non-verbal respir. infect.

DAKOTA COUNTY VOUCHER PARTICIPANTS - YR 2

Situation	Child #12	Child #13 Child #14	Child #15	Child #16	Child #17	Child #18	Child #19	Child #20	Child #21
Client Age(s)	11	9, 12	2	10	6	3	15	8	7
#, ages other child. at home				one- 12 yrs.	one - 11 yrs.			2, 4 yrs (also one in college)	
Devel. Disab. of child	Profound MR, Epil., non-commun atrophy, hearing and vision loss	#13-Mod. MR; #14 - mild MR	Cong. myopathy, muscle disorder, non-mobile	Severe MR, CP, Epil- epsy, phys disorder, non-verbal	Profound MR, CP, non-verbal non-mobile	MR, CP, non-verbal, non-mobile	Autism	Rett's Syndrome, seizures, prof. MR	Severe CP, seizures, borderline IQ
State Asst.	TEFRA, Fam.Sub.	MA, Waiver Fam.Sub., SSI	TEFRA	TEFRA	TEFRA	TEFRA	Fam. Sub.	TEFRA	Fam. Sub.
Amt. of Co.Asst (/yr)	\$6,546	\$6,000 + waiver costs	\$4,100	\$1,800	\$2,470	\$2,598	\$13,000	\$1,800	\$4,992
Medical Con- ditions of client	Minor Un- controlled seizures, diapered, non-verbal non-mobile	Neurogenic bladders, allergies; #14 has controlled seizures	Trach. repair, diapered	Controlled seizures, diapered	Seizures, bacterial ear/lung infections, diapered	Diapered	Behavior	Total care required; non-mobile non-verbal gastro tube	Non-mobile

ACTIVITY: Train families to use vouchers. This includes: planning for expenditures; hiring, firing, monitoring in-home providers; taxes and other liabilities; planning for special events and crises. Some or all of these sessions will be open to families not in the voucher project. Maintain participant-to-participant communication. Provide funds and information about additional trainings, to be used at each family's discretion.

PROJECTED COMPLETION DATE: 9/30/91

BUDGET FOR TASK: \$ 12,880 \$ 11,260 \$ 1,620
(Total) (Federal) (Local)

ACTIVITY COMPONENTS:

- Hold day-long training workshops featuring topic experts in:
 - October - (TOPIC: Project introduction, expenditure guidelines, ideas)
 - November - (TOPIC: Personnel issues such as recruiting, hiring, firing, monitoring, paying, training)
 - December - (TOPIC: Managing taxes and other liabilities)
 - February - (TOPIC: Filing, piling, record keeping)
 - April - (TOPIC: Planning for predictable events, long range priorities, special events, crises)
 - June - (TOPIC: Review of where participants are. Also - family picnic)
 - August - (TOPIC: to be determined)
- Families complete additional trainings on topics specific to the needs of their families.

PROJECTED COMPLETION DATE:

- 10/31/90*
- 11/31/90
- 12/31/90
- 2/28/91
- 4/30/91
- 6/30/91
- 8/31/91
- 9/30/91

QUARTERLY REPORT: __1st; __2nd; __3rd; __4th

Held a weekend retreat for families (parents and children) at Cragun's Resort in Brainerd October 4-6. The retreat, which was suggested and strongly supported by the Advisory Committee, attracted 15 of the 25 participating families. The event was planned and facilitated by ARC Suburban (at the request of Dakota County) and featured workshops, speakers and time to contemplate the future. It also allowed families to do the networking that they said they valued in the project.

* Because of tight timeline, all Year 2 applicants will be encouraged to attend this session if final action on their applications is pending.

ACTIVITY:

Participants complete monthly journals for purposes of project monitoring and evaluation.

PROJECTED COMPLETION DATE: 9/30/91

BUDGET FOR TASK: \$ 4600 \$ 4510 \$ 90
 (Total) (Federal) (Local)

ACTIVITY COMPONENTS:

- Train participants how to do journals, including what to report, how often to report. Suggested formats for journals will be provided based on Year 1 experience. At minimum, journals will include: listing of caregivers each month, listing of goods, services purchased, amounts of funds used, source of funds, outcome of expenditure (goods or services), most rewarding day, most frustrating day.
- Receive, analyze and pay participants for completed journals.

PROJECTED COMPLETION DATE:

10/31/90

9/30/91

QUARTERLY REPORT: __1st; __2nd; __3rd; __4th

As indicated in previous reports, some families consistently had trouble submitting journals, despite repeated reminders from social workers and project staff. Some of this group have also failed to report their voucher account expenditures for some portions of the year.

Because the journals - and certainly the expenditures reports - are so important for accountability purposes, they cannot be dropped, especially as the project becomes business as usual. See Attachment G for proposed guidelines.

