



**Intended Beneficiary Command  
Or**

**Important Partnerships  
Within the Community Mental Health System**



# Course Objectives

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- 1) Describe the relationship between the Board, Individual Beneficiaries and other stakeholders.
- 2) Identify at least 3 opportunities and/or strategies for promoting and supporting individual beneficiaries in leadership, administrative, management and in the provision of supports, services, care and treatment.



# Course Objectives

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- 3) Identify at least 3 opportunities and/or strategies for promoting and supporting individual beneficiaries in system assessment, evaluation, planning, implementation, management, monitoring and improvement efforts.
  
- 4) Identify at least 2 opportunities and/or strategies for promoting and supporting individual beneficiaries' choice as an informed, responsible and prudent purchaser.

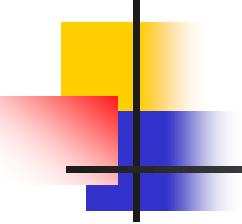


# Clarifying the Term “Intended Beneficiary”

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The term “Intended Beneficiary” is used to show the unique relationship between customers/consumers, also known as Persons Served, the CMHSPs/PIHPs, private providers, and the community as well. This term was coined in an effort to keep the focus where it should be in our CMH system, to keep “the main thing the main thing”.

These partnerships between stakeholders are ones that should be built on a foundation of mutual respect.



# Consumer (or Person Served) Leadership

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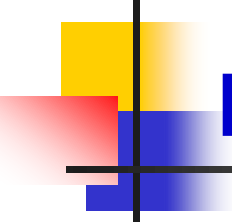
- The Consumer Movement – The History
- Opportunities to serve within the community mental health system
- Customer/Consumer/Person Served involvement is not limited to the local public system but is also essential in private sector organizations.



# Qualities of Effective Leadership

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- Passion
- Concern for Others
- A desire to improve their leadership skills through Education
- Available to Serve



# **Practical Ways to Assist Customer/Consumer/Persons Served Board Members**

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- Provide an orientation to Board roles and responsibilities
- Provide a Mentor
- Respect Consumers/Persons Served for their views and ideas
- Provide employment opportunities, supported if available
- Provide accommodations to each consumer/person served specific to their needs



# Opportunities for Customers/Consumers/ Persons Served

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## Compensated Opportunities

- Full or Part Time
- Shared Time
- Contract
- Internship

## Volunteer Opportunities

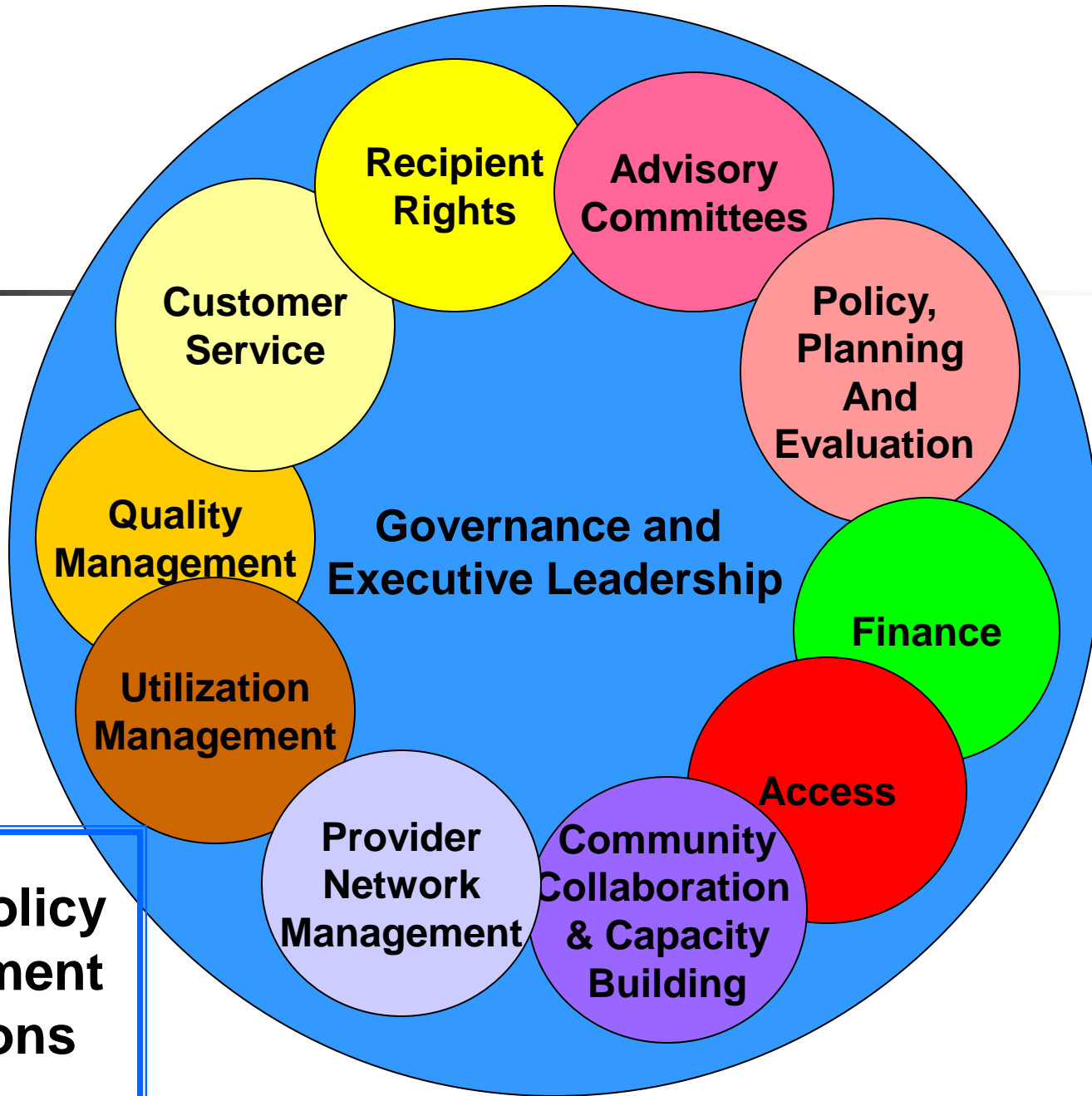
- Per Diem
- Stipends
- Transportation
- Internship





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# **Public Policy Management Opportunities**



**Public Policy  
Management  
Functions**



# **Public Policy Management Functions**

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**Governance  
and  
Executive Leadership**



# Governance and Executive Leadership

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- ***Governance:*** Appointed citizens who establish policy direction and provide oversight to ensure CMHSP/PIHP public accountability.

Consumers/Persons Served on Boards bring the richness of personal experience and their passion which blends well with community leaders on the Board creating a much more informed body for making decisions.

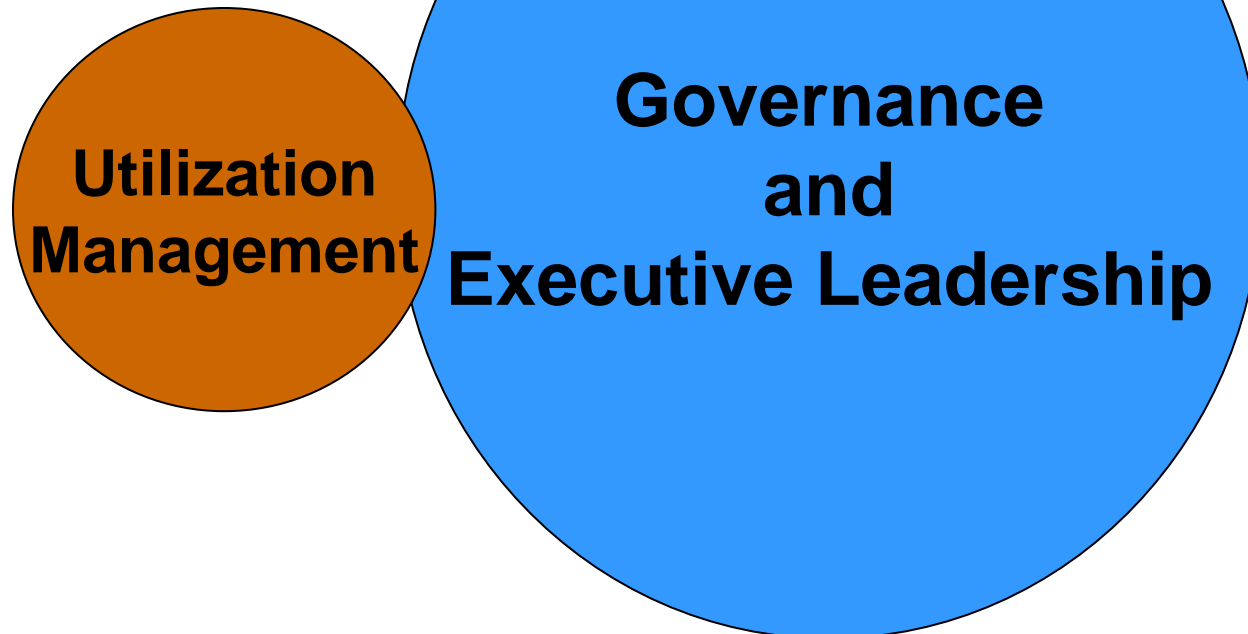
- ***Executive Leadership:*** The top leadership, starting with the Executive Director along with his/her Senior Leadership Team, are to ensure the policy direction of the Board is carried out.

Much like governance, consumers working with Executive Staff provide information to assist in making decisions and prioritizing what items the CMHSP/PIHP needs to focus on. Recruitment of consumers/persons served for executive-level positions should also be considered.



# **Public Policy Management Functions**

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# Utilization Management

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## **Utilization Management:**

A system-wide effort to ensure:

- Fairness in providing supports and services to people served by the community mental health system
- That the services received are the right types, amounts, and duration as outlined in each individual Person-Centered Plan.

Consumers greatly benefit from improvements made to uniform standards of care and support.

The goal is to provide the same uniform care no matter what part of the state you're in receiving your services.



# **Public Policy Management Functions**

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**Quality  
Management**

**Governance  
and  
Executive Leadership**



# Quality Management

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- ***Quality Management:*** The careful review and analysis of the many practices and programs performed within each CMHP/PIHP organization. Recovery is one of the most important quality-of-life concerns for customers/consumers/persons served and their support persons. To guarantee that successful outcomes are being reached by all, whenever possible goals should be measurable.

There are many tools available to educate consumers/persons served in their important roles as system evaluators. Experiences with mental health issues also give consumers/persons served unique insight about the data gathered as well as the programs themselves. Consumers'/Persons Served evaluation can also help to identify areas that need improvement within an organization's structure.





# **Public Policy Management Functions**

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**Customer  
Service**

**Governance  
and  
Executive Leadership**



# Customer Service

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- ***Customer Service:*** Customer service representatives are there to ensure quality interactions with customers/consumers/persons served, staff, and provider organizations. Any problems or if additional assistance is needed, the customer service staff is available to help resolve issues.

Consumers/Customers/Persons Served can provide exceptional customer service. Their experience and expertise is important in providing insight, community learning opportunities, conducting consumer satisfaction surveys and focus groups.



# **Public Policy Management Functions**

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**Recipient  
Rights**

**Governance  
and  
Executive Leadership**



# Recipient Rights

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- ***Recipient Rights:*** The Office of Recipient Rights is designed to protect the rights of customers/consumers/persons served.

There are advantages to involving customers/consumers/persons served in the functions of ORR. They are excellent resources to educate people about their rights, investigate complaints received, and provide education about rights to people who work in the community mental health system.



# **Public Policy Management Functions**

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# Advisory Committees

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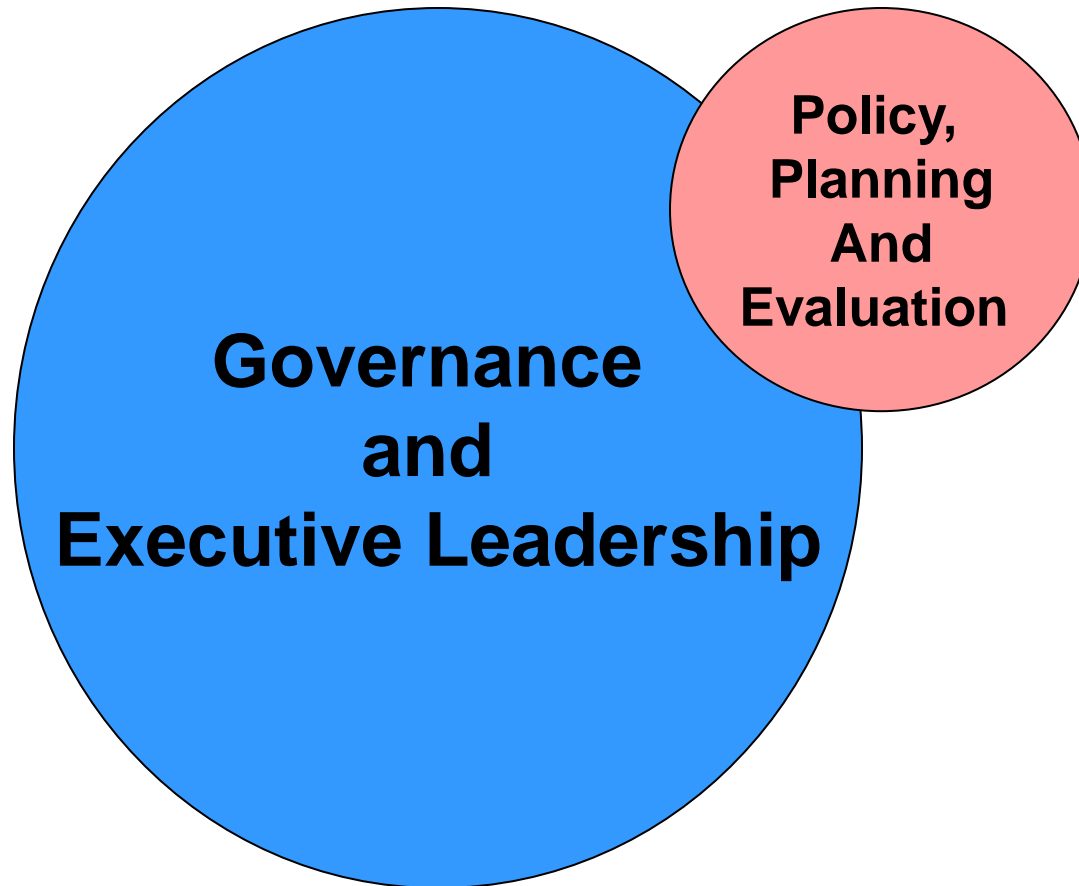
- ***Advisory Committees:*** Advisory committees are critical to the oversight of our organizations. Committees include Recipient Rights Advisory Committee, Consumer/Persons Served and Family Advisory Councils, as well as other advisory groups and commissions within the CMHSP/PIHP system as well as other public committees in our communities.

Boards and committees provide valuable experience in developing leadership skills that can be used in the mental health system and other civic positions such as citizen police commissions, and city and county committees such as public health boards and housing authorities to name a few.



# **Public Policy Management Functions**

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# Policy, Planning and Evaluation

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- ***Policy, Planning, and Evaluation:***

These Board and organizational functions are necessary for:

- Defining the organization's mission and values
- Policy review and development
- Approval of short and long-range goals and plans.

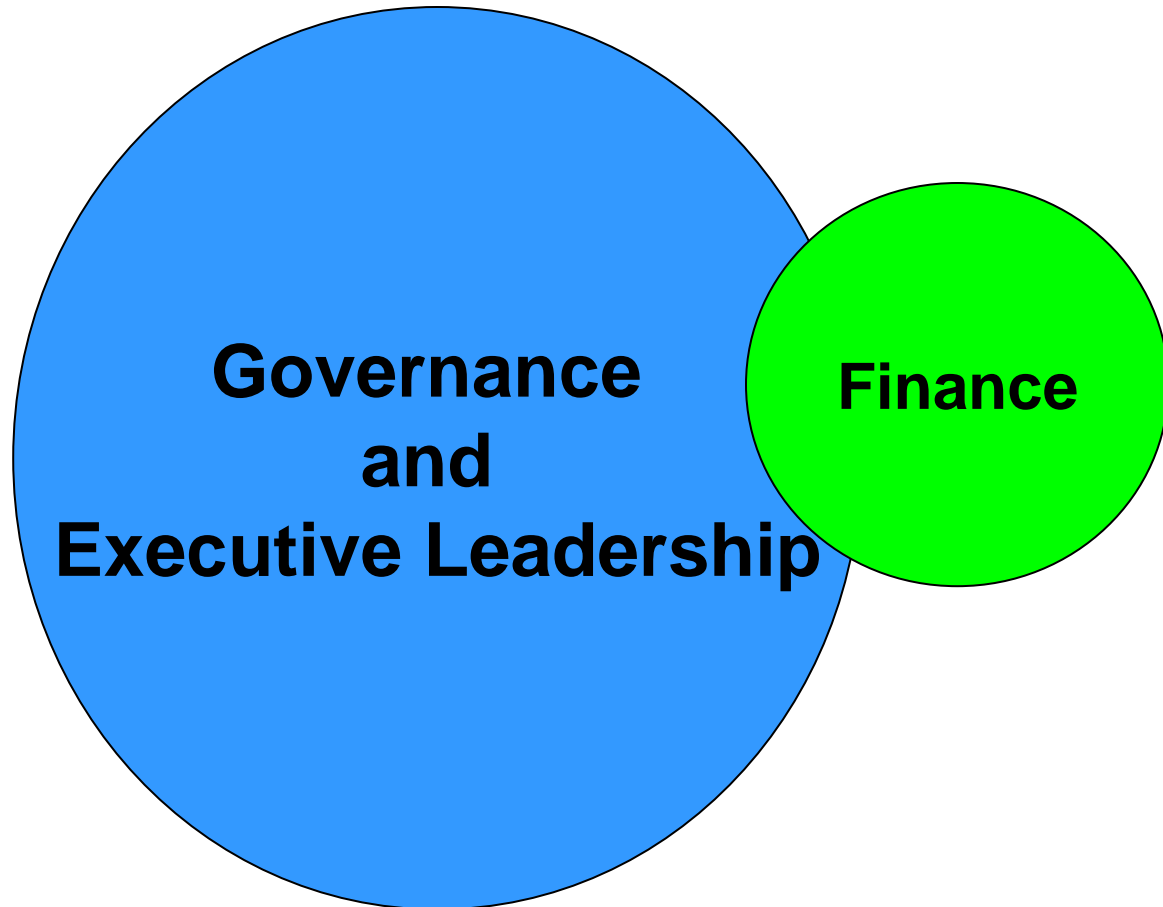
It is vital for customers/consumers to be actively involved in the above activities. Customer/Consumer/Persons Served involvement can also include the evaluation of supports and services and the implementation and management of Evidence-Based Practices.





# **Public Policy Management Functions**

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# Finance

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- ***Finance: Show me the money \$\$\$.***

Having a good understanding of the finances of your organization is essential. It is even more critical for Consumers/Customers/Persons Served Board Members to have a good working knowledge of your financials.

Proper fiscal management ensures successful operations and good quality of life for the people we serve. Board members are responsible for approving the Annual Budget, working with finance staff to understand financial reports, challenging staff to produce financial documents that are user-friendly, and supplying information about the various revenue streams so that the agency can remain solvent in these troubled times.



# **Public Policy Management Functions**

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**Governance  
and  
Executive Leadership**



**Access**



# Access

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- **Access:** This is the method to provide the assistance people need to gain “access” to the services in a timely manner. Many new concepts are being developed to help streamline this process to make it easier for the people we serve to get the help they need.

The access point is another great opportunity to include customers/consumers/persons served. Their insight into mental health issues has been shown to be of great benefit to people in crisis. Peers are starting to be included on every level from the “first contact” with individuals admitted to psychiatric wards and hospitals, serving as advocates, and assisting individuals in applying for benefits from different systems (such as VA and Social Security, etc.)



# **Public Policy Management Functions**

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**Governance  
and  
Executive Leadership**



**Community  
Collaboration  
& Capacity  
Building**



# Community Collaboration and Capacity Building

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- ***Community Collaboration:*** In these challenging financial times it's more important that we make greater efforts to partner with other community stakeholders as a more efficient way to deliver services and to highlight problem areas that need to be addressed such as housing, transportation, and employment, to name a few.

There are opportunities for Customers/Consumers/Persons Served to assist in building collaborations with other community stakeholders. They bring knowledge, personal experience, personal strengths, passion, and desire to help target issues and improve the quality of life for everyone.



# **Public Policy Management Functions**

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**Governance  
and  
Executive Leadership**



**Provider  
Network  
Management**




# Provider Network Management

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- ***Provider Network Management:*** Not every CMHSP/PIHP provides direct service to the people we serve. For those organizations that contract out service delivery, it is necessary to manage the provider network activities.
- Functions include general contract management, provider orientation, Recipient Rights coordination, training opportunities, and monitoring the efficiency of providers in the network.

This is a great area for customers/consumers/persons served to influence provider learning as well as monitoring efforts.



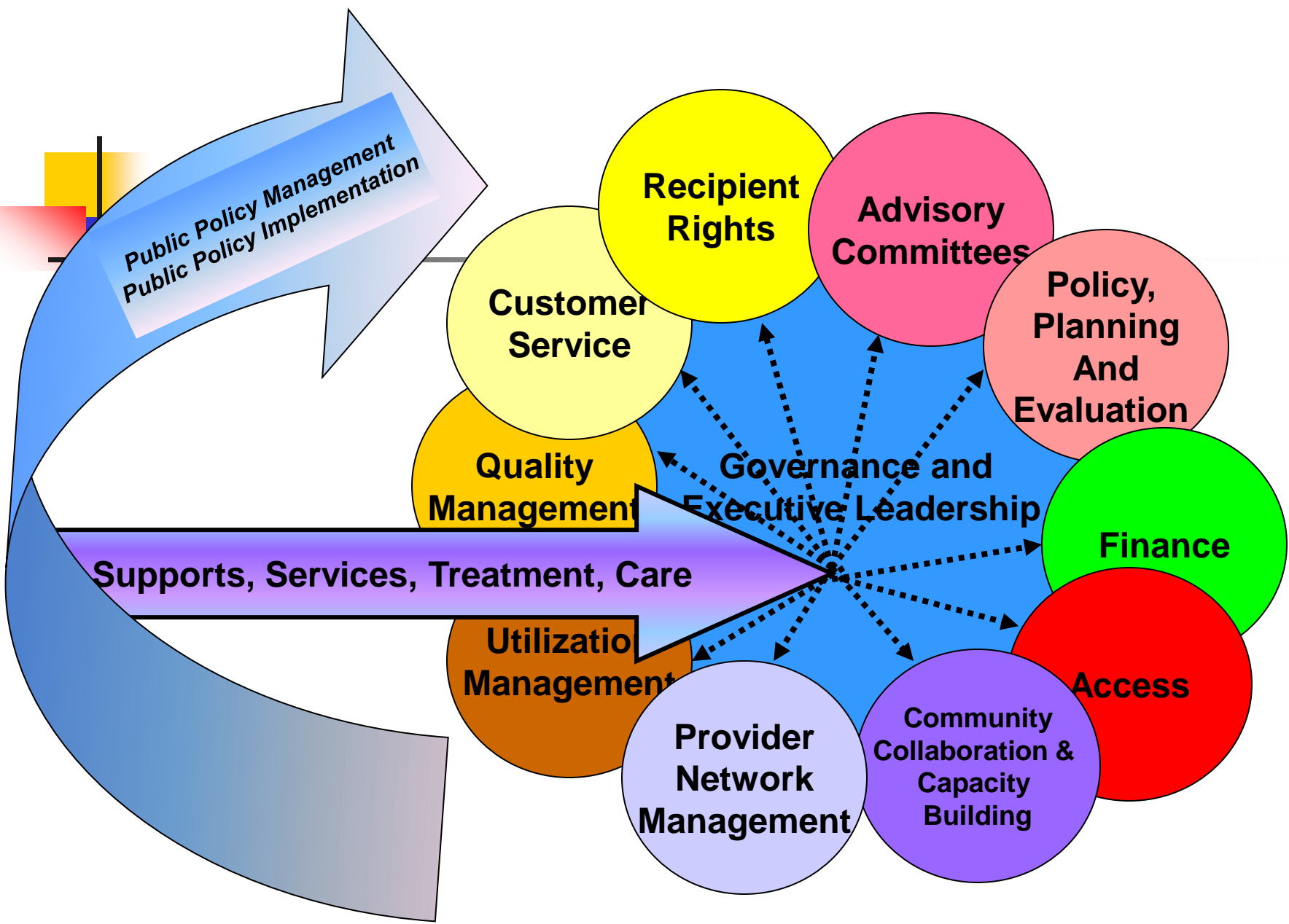


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YOUR  
THOUGHTS**



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# **Public Policy Implementation Opportunities**





# Supports

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- Almost everyone needs support at one time or another to pursue and achieve life goals and maintain a good quality of life. This is the essence of the Person-Centered Planning Process.
- The plan is the blueprint for what services and supports are needed and approved to aid consumers/persons served in reaching their life goals. Supports can also include community resources as well as assistance received through our public systems.



# Services

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- Services are provided through individuals that work in the community mental health systems. Services are intended to work with the supports consumers/persons receive along with their treatment.



# Treatment

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- There are a variety of medical and clinical services that may be needed for a time, such as physicians, psychiatrists, nurse practitioners, or therapists.
- The key is having professionals who partner with consumers/persons served to focus on how their treatment goals relate to their desired quality of life outcomes.



# Methods of Supports and Treatment

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- **Traditional:** Residential or Day Psychiatric Programs.
- **Non-Traditional:** Supported living arrangements, supportive employment, and educational opportunities.
- **Consumer/Peer-Led or Delivered:** Clubhouses, Drop-In Centers, and other Peer Delivered Services



# QUESTIONS?

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# **For More Information Regarding This Presentation**

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***CONSUMERS/PERSONS  
SERVED IN COMMAND.....***