

CONSUMER AND FAMILY PARTNERSHIP TEAM (CFPT) GUIDELINES

EFFECTIVE DATE: July 1, 2011

PURPOSE

Active and purposeful consumer and family member involvement is essential to helping to ensure that Ohio's behavioral health system is consumer-informed, collaborative, culturally competent, trauma-informed, and recovery/resiliency-oriented.

The Ohio Department of Mental Health's (ODMH) Consumer and Family Partnership Team (CFPT) is designed to increase and strengthen consumer and family participation through their targeted areas of expertise on ODMH committees and workgroups.

Under the guidelines of CFPT, participants on ODMH committees and workgroups are intended to include: ODMH and other state system representatives, community mental health professionals, consumer peers (adults and youth), and family members from around the state who represent various cultural and ethnic perspectives.

The five (5) key components of consumer and family partnership that ODMH's designated CFPT Lead¹ coordinates and helps to facilitate are:

- 1. Recruitment**
 - 2. Orientation/Mentoring**
 - 3. Expectations of ODMH Staff**
 - 4. Expectations of Consumers and Family Members**
 - 5. Reimbursement and Stipend Policy**
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1. Recruitment

The need to create a pool of representative Peers from diverse cultural, ethnic, and racial backgrounds is crucial to transformation.

- a) The Ohio Empowerment Coalition (OEC) Director or designee will develop a database of consumers and family members who are able to serve on ODMH committees, workgroups, and focus groups as content area experts, as well as represent consumer interests on statewide and local levels.
- b) At least 30 days prior to a workgroup/committee beginning, the Committee Chair will notify the CFPT Lead of the need for consumer and/or family representation. The CFPT Lead will contact the OEC Director or designee with the request for a particular content area expert. The Executive Director of the OEC will respond to both the CFPT Lead and workgroup/committee facilitator within 1 week of the request in accordance with the number of peers and/or family members stipulated in the Stipend Peer Guidelines below. (Additional peers and/or family members may participate in a non-paid status with the approval of the Committee Chair.)

CFPT Lead¹: A designated member of the ODMH Office of Community Planning and Recovery Initiatives who coordinates the day to day CFPT operations, including recruitment, retention, advocacy, reimbursements, and other tasks as assigned.

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Stipend Peer/Family Member Guidelines:

- 2 Peers or Family Members on committee/workgroup of 12 or less members
- 3 Peers or Family Members on committee/workgroup of 13+ members.

*** Special considerations may be pre-approved**

- c) All consumers and family members will be screened, oriented, and approved by the OEC Director or designee prior to participating in any ODMH sponsored activity.
- d) The OEC will maintain a database of consumer and family member content experts who have indicated interest in participating in ODMH activities and in being a liaison to ODMH.
- e) The OEC will outreach to consumers and family members on an ongoing basis for ODMH committees and workgroups to entities such as NAMI, Consumer Operated Services, Client Rights Specialists/Officers located at RPHs and local Mental Health Boards, etc.

2. Orientation/Mentoring

The CFPT Lead and Executive Director of the OEC or designee will jointly hold a formal CFPT Orientation Meeting twice a year for Consumers and Family Members.

- The CFPT Lead will orient participants to ODMH's CFPT reimbursement guidelines, participant expectations, forms, etc.
- The Executive Director of the OEC or designee will orient participants to basic principles of advocacy.

Effective July 1, 2011, all new consumers and family members desiring to serve on a workgroup/committee (even those who have previously functioned in this capacity) will need to complete an orientation meeting prior to participating on a committee/workgroup. Participants in single events generated by ODMH may be exempt from completing orientation

Prior to attending the first committee meeting, the CFPT Lead will make a copy of the signed CFPT Expectation Form for each consumer and family member and provide it to the Committee Chair.

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Orientation to committee workgroup by Committee Chair or designee:

The Committee Chair or designee is responsible to ensure that a brief orientation takes place for each consumer and family member involved in the committee/workgroup. The Committee Chair will develop and have each consumer and/or family member sign an individualized participation agreement (outlining expectations for the committee/workgroup).

The orientation consists of a face-to-face meeting or phone conference to answer any questions and to provide the following information, preferably in written form:

- Overview of the committee's function and scope of work
- Current committee members
- Explanation of the group's history and current work focus
- Frequency and length of meetings
- Duration of committee work (anticipated) and any relevant documents needed for review

During the first scheduled meeting, the Committee Chair or designee should emphasize why consumer participation is important and how it enhances the Department's focus on recovery and resiliency. It is vital for all professional committee members, internal members from ODMH and external members from other organizations to understand and accept the value of Peers serving on committees, and to welcome their participation.

The Committee Chair or designee should offer to sit with the consumer and/or family member during meetings, provide appropriate introductions, explain acronyms and provide positive reinforcement through direct group interactions.

If a positive experience takes place during the initial period, it is more likely that continued participation and quality input by the consumer will take place. ODMH staff should acknowledge and celebrate individual success and achievement.

Mentoring

In order for consumers and family members to play a meaningful role in the meeting process, the Committee Chair or designee is responsible to ensure that each consumer and family member has a mentor on the committee/workgroup. The mentor will explain the meeting purpose and process as well as encourage each Peer to provide input when he or she feels comfortable. This will help ensure equal representation, quality input, and help the Peer play an active role in the process.

The Committee Chair should provide all mentoring opportunities, and/or assign an appropriate team member to mentor those Peers who want a mentor. The practical use of structured mentoring should create trust, forge an equal partnership, and

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promote consumer leadership and recovery within the mental health system. As an organization, each committee member (representing a variety of disciplines) should be encouraged to take the opportunity to forge a viable cohesive relationship with a consumer or family member to ensure successful collaboration.

Expectations of ODMH Staff

Responsibilities of ODMH CFPT Lead:

- Actively recruit Peers in collaboration with the OEC
- Assign consumers and family members to committees or groups in collaboration with the OEC
- Establish a centralized location for payment request forms within Central Office
- Keep the centralized location for payment request forms well stocked
- Process and submit all payment requests for processing to the fiscal agent twice a month (15th and end of month)
- Provide assistance and support to consumers and family members around CFPT processes, as needed
- Provide support to ODMH staff as needed

Responsibilities for Committee Members

- Be on time
- Ensure that everyone is treated as an equal member of the committee, valuing both work and lived experiences
- Actively listen to others
- Be respectful of different cultures and ethnic groups
- Treat all committee members with respect

Responsibilities for Committee Chair or Designee:

- Designate a mentor for each consumer and family member
- At the first meeting have the group set ground rules through consensus
- Revisit the ground rules as necessary
- Provide a membership contact list to each member
- Make sure each meeting agenda and all communication regarding the meeting includes the exact name of the group, directions to the meeting location and contact numbers in case of emergency
- Provide sign-in sheet, agenda and CFPT Payment Request Forms
- Provide written information to consumer and family members as needed to ensure a good foundation during orientation about scope of work, purpose of the committee, etc.
- Provide a monthly calendar of future meetings, times, and places

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- Try to avoid scheduling conflicts with other Peer-oriented activities or meetings
- Take consumer and family member transportation needs into consideration for scheduling and meeting locations
- Make yourself available to discuss any questions consumers and/or family members may have about the committee, history and work of the group
- During and/or after the meeting ask consumers and/or family members for input at regular intervals
- Maintain firm and fair facilitation for all group members during every meeting
- Debrief with consumers and/or family members after the meeting
- Send out meeting minutes to all members in a timely manner
- Provide a separate orientation meeting prior to new Peers joining the group
- Follow-up with any consumer or family members who did not attend the meeting in person or via videoconference. Personal calls are preferable, especially early in the person's involvement with the group
- **Review and sign completed CFPT Payment Request Forms immediately after the meeting and submit to the ODMH CFPT Lead**

Procedures for cancelled or rescheduled meetings:

It is crucial that each committee member is notified in a timely manner about meeting cancellations, changes in meeting locations, and rescheduled meetings.

- The Committee Chair should ensure that there is a current roster of members with up-to-date contact information so that each member may be contacted at least 48 hours before a change occurs.
- If a meeting is rescheduled to an earlier date, the notification should be at least 24 hours prior to the new date and time.
- The primary method of communication is a group e-mail...Committee Chair or Designee will call those consumers and/or family members who do not have e-mail addresses and/or access to e-mail in their home.
- The Committee Chair and/or designee should make sure someone is at the location of the cancelled or relocated meeting or that there is sign posted at the location with the new meeting information and the designee's contact information.

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4. Responsibilities of Consumers and Family Members:

- Follow the CFPT Participation Expectations reviewed, distributed, and signed in CFPT Orientation
- Attend all scheduled meetings
- Notify Committee Chair or designee if you cannot attend a meeting
- Be on time and stay until the end of the meeting
- Before traveling, consumers and/or family members should make a copy of the agenda notice with the exact name of the group, location, and emergency contact numbers and then call ahead to make sure the meeting will be held as scheduled.
- If the travel reimbursement and stipend are not sufficient to cover the cost of a consumer's and/or family member's participation in a group, then the consumer and/or family member should talk to the Committee Chair or designee or the CFPT Lead about other ways to participate that require less travel or time, such as teleconferencing
- Share and process with fellow committee members during or immediately after each meeting
- **Travel reimbursements and stipends are only meant to help defray the cost of participation in an ODMH activity; these funds should not be considered an income source**

Please Note:

- Stipends are taxable income. Each consumer and/or family member who accumulates \$600 or more in stipends during a calendar year will receive a 1099 MISC Form.
- It is the responsibility of the consumer and/or family member to contact his or her employer, tax lawyer or local Jobs & Family Services Benefits Counselor to assure that these funds do not adversely affect his or her entitlements or income tax filing status.
- The ODMH CFPT Lead will provide contact information for benefits counseling upon request.

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5. Reimbursement and Stipend Policy

Consumers and family members may be eligible to receive travel reimbursement and/or a stipend for the days they participate in committees and/or workgroups.

Participation with CFPT compensation is limited to no more than two committees/workgroups at the same time.

Travel/Mileage Reimbursement:

- Peers who make use of public transportation will be reimbursed based on the actual cost of their transportation documented either with receipts or published fare schedules
- All taxi reimbursement requires pre-approval no less than 48 working hours prior to the date of the meeting by the ODMH CFPT Lead
- Reimbursement for travel to canceled meetings will typically not be approved. However, special circumstances will be evaluated on a case by case basis
- Mileage reimbursement may only be claimed by the driver or on behalf of the driver of the vehicle
- Final mileage reimbursement will be determined based on mileage as calculated in MapQuest from point A to point B
- If there are extenuating circumstances regarding travel to a meeting location the Peer must seek preapproval from their Committee Chair in order to seek/obtain full reimbursement (i.e., getting lost, detours, etc.)

Stipends:

- A stipend may be requested for consumers and/or family members who participate in ODMH sponsored teleconferences, video conferences, group/team meetings, and/or document review request
- In order to receive the stipend for each meeting, consumers and/or family members are expected to be in attendance for the entire meeting and to actively participate in accordance with the signed participation agreement
- The funds paid are tiered based upon the type and duration of the activity completed (listed on the payment request form)
- If there are variances from the listed activities, the ODMH CFPT Lead will determine stipend amount with his/her supervisor

Processing and Payment:

- Payment request forms will be provided at each meeting by the Committee Chair or designee

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- The Committee Chair or designee must sign and submit the completed forms to the ODMH CFPT Lead. It will be left up to the discretion of the ODMH staff facilitating the meeting to verify each consumer's and/or family member's attendance by signing the payment request forms
- To receive reimbursement, payment request forms must be completed, signed, and turned in at the end of each meeting
- ***No payment will be issued for forms turned in 60+ days after the date of the meeting.**
- If a check has not been received, consumers/family members may call the ODMH CFPT Lead 30-days after the meeting date in order to ensure that their payment request form has been submitted
- CHECKS MUST BE CASHED WITHIN 60-DAYS OF ISSUANCE OR THEY WILL BE COME VOID.
- IF A CHECK IS MISPLACED OR LOST IT MAY BE REISSUED UPON REQUEST IF REQUESTED PRIOR TO COMING VOID; HOWEVER, THE STOP PAYMENT FEE (CURRENTLY \$31.00) WILL BE SUBTRACTED FROM THE TOTAL AMOUNT OF EACH CHECK AND WILL BE REISSUED.
- HOWEVER, IF THE CHECK IS LESS THAN THE CURRENT STOP PAYMENT FEE NO REISSUANCE WILL BE CONSIDERED.

Special Accommodations:

- All overnight lodging requires preapproval by CFPT Lead prior to the date of the meeting, based upon the recommendation of Committee/Workgroup Chair
- CFPT overnight accommodations will be reimbursed in alignment with State Guidelines, Policy for ODMH Travelers, which specifies lodging may be reimbursed only when required to travel at least 45 miles one's his/her residence

Reimbursement rates are subject to change without advanced notice. Stipends and mileage rates will be reimbursed based on the state rate and availability of funding.

Please Note:

- Consumers and/or family members who are employed and paid by their employer for their time and/or travel expenses are not eligible to receive reimbursement or stipend from CFPT funds.
- Consumers and/or family members who are employed by a statewide organization funded by ODMH are not eligible to receive CFPT funds.