



Indiana Protection & Advocacy Services (IPAS) Commission Meeting Materials

FY 2023, Quarter 4

Public Meeting

Prepared for the
Indiana Protection and Advocacy Services (IPAS)
Commission Meeting
November 17, 2023

Equality Through Advocacy

The Protection and Advocacy System for the State of Indiana



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**Indiana Protection & Advocacy Services Commission
Indiana Disability Rights
4755 Kingsway Dr., Suite 100
Indianapolis, IN 46205**

**IPASC Executive Session
Friday, November 17, 2023 – 12:15-1:30 pm, EST**

AGENDA

- I. Discussion of strategy with respect to litigation (Indiana Code 5-14-1.5-6.1(b)(2)(B))**
- II. Job performance evaluation of an individual employee (Indiana Code 5-14-1.5-6.1(b)(9))**
- III. Receive information about prospective appointees (Indiana Code 5-14-1.5-6.1 (b)(5))**

#

Equity Through Advocacy

The Protection and Advocacy System for the State of Indiana

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Indiana Protection & Advocacy Services Commission
Indiana Disability Rights
4755 Kingsway Dr., Suite 100
Indianapolis, IN 46205

IPASC Public Meeting
Friday, November 17, 2023 – 1:30-4:00 pm, EST

AGENDA

- A. Call Meeting to Order
- B. Introductions
- C. Changes to Agenda
- D. Approval of Minutes from 08-18-2023*
- E. Reports:
 - 1. By-Laws Subcommittee (T. Crishon) – No report.
 - 2. Membership Subcommittee (A. O'Haver)
 - Membership* – 1 Governor appointee vacancy; 4 applications for board appointments on file
 - Members with terms expiring in 2023:
 - Ray Lay – Nov. 30, 2023 (eligible for re-appointment)*
 - 3. ED Evaluation Subcommittee* (A. O'Haver)
 - 1. Vote on performance evaluation rating for M. Keyes
 - 4. Strategic Planning Subcommittee Update (A. O'Haver)
 - 5. Mental Health Advisory Council Report (R. Vilensky)
 - 6. ED Reports/Quarterly Reports (M. Keyes)
 - 7. Finance Report* (M. Keyes)
 - a. FFY 2023 Q4 Finance Report
- F. Old Business:
 - 1. Update from Employment Summit
- G. New Business:
 - 1. FFY 2025-2027 Priorities & Objectives Planning
 - 2. Scheduling FFY 2024 Meeting Dates (proposed)
 - 1. Feb. 23, 2024
 - 2. May 31, 2023
 - 3. Aug. 30, 2024
 - 4. Nov. 22, 2024
- H. Comments, announcements, other business
- I. Next Meeting Date: TBD
- J. Meeting Adjournment

***Voting Items**

###

ZOOM LINK / CALL-IN INFO FOR IPAS COMMISSION - PUBLIC MEETING
Join Zoom Meeting: <https://zoom.us/j/91986888171>

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Meeting ID: 919 8688 8171

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**Indiana Protection & Advocacy Services Commission
Indiana Disability Rights
4755 Kingsway Dr., Suite 100
Indianapolis, IN 46205**

**IPASC Executive Session - Virtual
Friday, August 18, 2023 – 12:30pm – 1:30pm, EST**

Minutes

- I. Discussion of strategy with respect to litigation (Indiana Code 5-14-1.5-6.1(b)(2)(B))**
- II. Job performance evaluation of an individual employee (Indiana Code 5-14-1.5-6.1(b)(9))**
- III. Receive information about prospective appointees (Indiana Code 5-14-1.5-6.1 (b)(5))**

An Executive Session of the IPAS Commission was held on Friday, August 18, 2023. No topics were discussed other than those listed on the agenda.

#####

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Indiana Protection & Advocacy Services Commission
Indiana Disability Rights
4755 Kingsway Dr., Suite 100
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Indiana Protection & Advocacy Services Commission
Public Meeting – Friday, May 19, 2023

Minutes

Attendees:

Commission: K. Dodson, S. Fulton, D. Haack, D. Heffelman, L. Hoops, R. Johnson, A. O'Haver, S. Simmons; **Absent:** Sen. V. Becker, S. Brinkman, R. Lay, J. Radziminiski, Rep. E. Rowray, H. Stephenson

IDR: T. Crishon, M. Keyes, K. Dulaney, D. Morris, E. Munson

- A. A. O'Haver, Chair, called the meeting to order at 1:46pm EST.
- B. Meeting attendees introduced themselves.
- C. No changes to today's agenda.
- D. **Approval of minutes from 2/17/2023 meeting – It was noted that K. Dodson attended the 2/17/2023 meeting which reported her as "absent" in error. Correction will be made to the minutes. Correction to today's agenda also will be made for this same item, D, the year will be corrected to 2023 rather than 2022. L. Hoops made the motion to approve the minutes from the meeting on 2/17/2023 with specified changes. D. Heffelman seconded the motion. Motion carried by a majority roll-call vote.**
- E. **Reports:**
 - 1. **No new report on By-Laws subcommittee. D. Heffelman, R. Johnson, and K. Dodson expressed interest in working on the By-Laws subcommittee. T. Crishon will contact each member individually.**
 - 2. **Membership Subcommittee (A. O'Haver)**
 - **As the newly-appointed MHAC Chair, Rachel Vilensky, will be the MHAC representative to the Commission.**
 - **R. Lay's term* will end 11/30/2023 and he has expressed his interest in reappointment. This will be added to the August Executive Session.**
 - 3. **ED Evaluation Subcommittee – A. O'Haver indicated that M. Keyes continues to do a great job.**
 - 4. **Strategic Planning Subcommittee – No new report on this subcommittee.**
 - 5. **MHAC (Mental Health Advisory Council) – M. Keyes reported that the MHAC voted in a new member, Leslie Stevens. Additionally, Rachel Vilensky and Nicole Beeman-Cadwallader were voted MHAC Chair and Vice-Chair, respectively, effective June 1, 2023. There remains one open MHAC position. R. Johnson asked**

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M. Keyes for an overview of what the position entailed. D. Heffelman also expressed an interest in the open MHAC position.

6. **ED Reports/Quarterly Reports (M. Keyes)** – M. Keyes provided an overview of agency activities during the quarter. A. O’Haver asked M. Keyes for an updated IDR organization chart that identifies individuals/teams.
 7. **Finance Report** – M. Keyes provided an overview of the finance report. S. Fulton motioned to accept the Finance Report; seconded by both K. Dodson and D. Heffelman. Motion carried by unanimous voice vote.
- F. Old Business:**
1. **Retreat Scheduling** – A. O’Haver began the process of determining two dates in August for the retreat and what the format of the retreat will be. A. O’Haver stated she will check with J. Radziminiski on her availability. One suggestion was made that a virtual retreat be held on Saturday, 8/19/23, from 10am – 3pm. M. Keyes will contact Joseph Pinnell regarding his availability.
 2. **IN General Assembly 2023 Wrap-Up** – E. Munson gave an update on bills that IDR focused on based on our interest and/or our mission. K. Dodson gave an overview of a bill that passed.
 3. **FFY 2024 P & O** – M. Keyes stated that this Fall IDR will begin detailed planning and development of the FFT 2025 P & O’s.
- G. New Business:**
1. **Voting Survey Discussion** – K. Dulaney gave an overview of a pilot project IDR put into place of surveying voting sites for compliance. R. Johnson (Commission) shared her experiences from surveying three voting sites.
- H. Comments, announcements, other business:** Nothing to report.
- I. Next Meeting Date:** **August 18, 2023 (Virtual)**
- J. Meeting was adjourned at 3:33pm EST.**

#####



Quarterly Report

FY 2023, Quarter 4

Prepared for the
Mental Health Advisory Council (MHAC) Meeting
November 15, 2023

and

Indiana Protection and Advocacy Services (IPAS)
Commission Meeting
November 17, 2023

Equity Through Advocacy

The Protection and Advocacy System for the State of Indiana



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Executive Director's Report

Key Updates

- The state is using a new Grants Management System called eCivis. The transition to the new system has been slow but we are hopeful that once it is fully implemented it will improve grant processing time and accuracy.
- Melissa Keyes was voted to join the NDRN Board of Directors as a Regional Representative Alternate. Melissa worked to change the NDRN Board's bylaws to include additional membership requirements for people with disabilities and people from marginalized communities.
- The state continues to change policies and processes that impact our agency. IOT is now requiring state employees to use ZoomGov accounts instead of professional Zoom accounts. This option has a significant added cost and IDR leadership is evaluating access.
- IDR's current case management system, PANDA, was sold to another company that will no longer service the product at the end of 2024. IDR is meeting with other PANDA users and exploring alternative case management products.

GOAL 1: IDR WILL COMPLY WITH ALL STATE AND FEDERAL REPORTING AND FINANCIAL PROCESSES.

- See the fiscal report for information on current grant balances and expenses.
- IDR completed all required federal and state quarterly reports. IDR continues to meet regularly with all federal funding agencies.
- IDR timely completed multiple requests from federal agencies for information.
- IDR timely completed federal draws.
- IDR completed the PABSS 2024 and PAIMI 2024 program applications.

GOAL 2: IDR WILL LEVERAGE OPPORTUNITIES TO INCREASE ITS CAPACITY.

- IDR is monitoring the federal budget discussions and is working with the state and federal agencies on plans to ensure continued operations in the event of a government shutdown.
- IDR continues to monitor state and federal resources for additional grant opportunities. There were no opportunities in line with IDR's mission during this quarter. IDR is reviewing Indiana's Victim of Crime Act (VOCA) programs and consulting with other P&As on how to best leverage this program as a possible funding source.
- IDR continues to advocate for full recovery of funds used to cover the Disability Law Fellow program. The funds have been approved by GCPD but is being held up in the state system.
- IDR currently has 6 vacancies with another staff member leaving at the end of November. We have developed a staffing plan and are working within the new state processes to begin posting positions soon, pending final approval of a federal budget.



GOAL 3: IDR WILL ENSURE ITS POLICIES AND PROCESSES ARE EQUITABLE, TRANSPARENT, AND ACCESSIBLE.

- IDR is working with SPD to do a job description audit. Following the salary adjustment in October 2022, many jobs were reclassified inappropriately.
- IDR is incorporating new state processes into its existing internal policies and processes.
- IDR's Executive Director responded to 4 appeals in Q4. None of the appeals requested Commission review. In FFY 2023, there were 11 appeals; 1 case was re-opened for fact-finding.

GOAL 4: EXECUTIVE DIRECTOR WILL SUPPORT IMPLEMENTATION OF THE COMMISSION'S STRATEGIC PLAN AND AGENCY PRIORITIES AND OBJECTIVES.

- Melissa Keyes supports the staff, Commission, and MHAC through direct supervision, technical assistance, connection to community resources, and facilitating access to programmatic needs.
- Project specific updates are included throughout the report.
- IDR staff are preparing for FFY 2025-2027 Priority and Objective development.

Diversity, Equity, and Inclusion Report

GOAL 1: IDR WILL PROVIDE SERVICES TO MORE PEOPLE WITH DISABILITIES FROM BLACK, INDIGENOUS, AND COMMUNITIES OF COLOR.

- In FY 2023, IDR staff completed 340.75 hours of professional development overall and 105.75 hours specifically on diversity and cultural competency training.
- Melissa Keyes met with four (4) new potential community partners to begin building relationships with organizations that primarily serve people from communities of color. IDR has started a rights education project with one of the organizations, discussed in more detail in DEI Goal 3.
- Carmen Ledezma attended a Binational Health Fair serving the Hispanic community in Frankfort, Indiana. This resulted in at least one case referral.
- IDR staff received training from Commissioner Ronelle Johnson about disability discrimination from her perspective.



GOAL 2: IDR STAFF, THE IPAS COMMISSION, AND MHAC MEMBERSHIP WILL REFLECT THE BROAD DIVERSITY OF INDIANA.

- IDR was ranked first (1) across all state agencies in the state's Pulse survey responses. This survey measures factors like engagement with your agency's mission, job flexibility, and inclusiveness.
- Amy Jarrett, IDR's Diversity and Cultural Competency Workgroup chair, received a scholarship to attend a conference in Tennessee titled, "Beyond Diversity Training: Leveraging Emotional Intelligence for Real Equity in the Workplace." Amy brought information from this conference back that will be implemented with staff.
- The IPAS Commission received training from Joseph Pinnell about Next Level Teams.
- IDR conducted a demographics survey of current staff, MHAC and Commission members. De-identified results are below.

	N	Disability	BIPOC
IDR Staff	28	10 (36%)	9 (32%)
MHAC	9	4 (44%)	1 (11%)
Commission	12	9 (75%)	5 (42%)

GOAL 3: IDR WILL STRENGTHEN ITS RELATIONSHIPS WITH ADVOCATES AND ORGANIZATIONS LED BY PEOPLE WITH DISABILITIES, PEOPLE FROM MARGINALIZED COMMUNITIES, AND PEOPLE WITH LIVED EXPERIENCES.

- IDR is working with Victory in the City to collaborate on educating kids about disability and disability rights through a quarterly series of assemblies.
- In late June, IDR staff attorney Tash Crespo raised concerns about proposed questions on the ACL One PPR (our annual report for several of our grants) regarding Sexual Orientation and Gender Identity (SOGI) demographics. Tash drafted comments and Melissa Keyes raised the issue with NDRN and ACL leadership. Melissa also engaged other DD Act partners on the issue as well. Several other P&As joined the issue and IDR signed on to their comments as well. As of September 29, ACL amended its guidance and interpretation to remove the harmful questions in favor of questions more in line with community expectations.



Client Demographics

Hispanic Ethnicity Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
Hispanic	7	4%	6	3%	4	2%	2	1%	19	2%
Not Hispanic	178	94%	197	92%	169	91%	161	91%	705	92%
Unknown	5	2%	10	5%	13	7%	14	8%	42	5%
Total	190		213		186		177		766	

Figure 1 – Client Hispanic Ethnicity Demographics

Gender/Sex Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
Female	79	42%	92	43%	74	40%	82	46%	327	43%
Male	107	56%	114	54%	101	54%	86	49%	408	53%
Other	0	0%	0	0%	1	1%	0	0%	1	0%
Unknown	0	0%	7	3%	0	0%	0	0%	7	1%
Blank	4	2%	0	0%	10	5%	9	5%	23	3%
Total	190		213		186		177		766	

Figure 2 – Client Gender/Sex Demographics



Race Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
Asian	2	1%	3	1%	2	1%	1	1%	8	1%
Black/African American	30	16%	33	15%	24	13%	21	12%	108	14%
Race Unknown	0	0%	0	0%	0	0%	0	0%	0	0%
White	143	75%	158	75%	141	76%	135	76%	577	75%
Blank	4	2%	8	4%	11	6%	12	7%	35	5%
Two or More Races	10	5%	8	4%	5	3%	6	3%	29	4%
Native Hawaiian/Other Pacific	0	0%	1	0%	1	<1%	0	0%	2	0%
American Indian/Alaskan Native/ Indigenous	0	0%	0	0%	0	0%	0	0%	0	0%
Unknown-Declined	1	1%	2	1%	2	1%	2	1%	7	1%
Total	190		213		186		177		766	

Figure 3 – Client Race Demographics

Age Demographics

	Q1 Count	Q1 Percent	Q2 Count	Q2 Percent	Q3 Count	Q3 Percent	Q4 Count	Q4 Percent	Total Count	Total Percent
1 to 3	2	1%	4	2%	1	<1%	0	0%	7	1%
4 to 10	15	8%	21	10%	23	12%	10	6%	69	9%
11 to 21	46	24%	51	24%	41	22%	31	18%	169	22%
22 to 40	44	23%	51	24%	43	23%	59	33%	197	26%
41 to 65	62	33%	69	33%	57	31%	61	34%	249	33%
66 to 80	14	7%	11	5%	9	5%	5	3%	39	5%
81 and above	3	2%	3	1%	3	2%	3	2%	12	2%
Blank	4	2%	2	1%	8	4%	7	4%	21	3%
Data errors	0	0%	1	0%	1	<1%	1	1%	3	0%
Total	190		213		186		177		766	

Figure 4 – Client Age Demographics



Priorities and Objectives Report

GOAL 1: PREVENTING, FINDING, AND STOPPING ABUSE, NEGLECT, AND EXPLOITATION OF PERSONS WITH DISABILITIES IN FACILITIES.

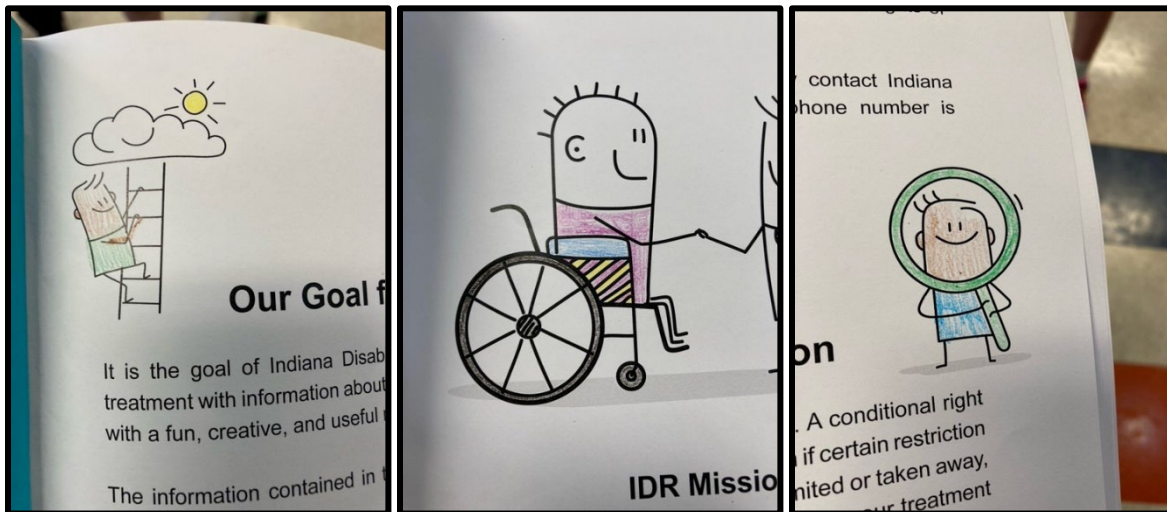
PRIORITIES TO ADDRESS:

1.1. Investigate facilities serving children with disabilities.

Educate

Know Your Rights Handbook

- 100 copies of the newly printed coloring book have been distributed to youth in residential treatment facilities. The feedback has been very positive.
- The coloring book was shared with the Deputy Director of DCS who shared the book and distribution information with all Residential Treatment Facilities.
- SAMSHA and PAIMI leadership were also provided a copy of the coloring book and commented that it was a wonderful example of rights education. Leadership shared it with other PAIMI program officers as a positive example to show other states.
- IDR attended rights meetings for youth currently at EPCC in early September to discuss the Know Your Rights coloring book. Some of the youth shared their colorings with IDR. See “Success Story – Goal 1” for more information.





Monitor and Investigate

Monitoring Project – PRTFs and PSFs.

	Q1	Q2	Q3	Q4	Total
Facilities visited	5	3	4	5	17
Reports filed with overseeing entities	1	0	0	1	2
Discharges assisted	1	0	0	1	2

Outcomes:

- Complaints related to the care and treatment of youth in residential facilities were reported to DCS, including racially based comments by staff, lack of staffing to provide outside recreation time, reports of religiously charged comments by the licensed teacher, rude staff, group punishment, and residents not able to keep personal possession or being notified of where those belongings are kept.
- IDR information was provided to youth and staff in all facilities.

Advocate

No current advocacy initiatives tied to this project.

1.2. Investigate or monitor for suspected abuse, neglect, exploitation, and rights violations in facilities or by a service provider.

Educate

Presentations

- Natasha Henry gave an overview of IDR's services to a total of 48 new staff members at the monthly ESH/EPCC New Staff Orientations. The presentation has been recorded for future use.
- Tina Frayer presented to 10 individuals from BDDS about IDR's services and discussed potential future collaboration.

Monitor and Investigate

Rep Payee

IDR presented 4 Rep Payee reviews to SSA which are now in end stages of review.

IDR ended its 2023 Rep Payee grant year with zero cases awaiting to be opened. This is a notable task as since the SSA Representative Payee program was reinstated in 2018, almost every P&A in the nation has been significantly behind on assignments and achieving benchmarks. IDR has set assignment goals and consistently achieved them to fully execute every assignment in a timely fashion; as such, IDR is anxiously awaiting assignment of both predictive and periodic cases in the coming quarter, beginning November 1.

Because Rep Payee reviewers have been with lower caseloads during this quarter, they've been participating in community diversity experiences, assisting with voter accessibility and being trained to assist with abuse, neglect and discharge.



Investigations

- 14 investigations were opened or still open.
- 3 investigations were conducted; 2 were substantiated.
- 1 investigation resulted in referral for additional action made.

Investigations in FY2023	Q1 Opened	Q1 Closed	Q2 Opened	Q2 Closed	Q3 Opened	Q3 Closed	Q4 Opened	Q4 Closed	YTD Open	YTD Closed
Client-to-Client Abuse	0	0	0	0	0	0	0	0	0	0
Death of Patient	0	0	0	2	0	0	0	1	0	3
Environmental & Facility Safety	0	1	1	0	0	0	0	0	1	1
Medication Errors	0	0	1	1	0	0	0	0	1	1
Neglect	2	0	2	2	1	2	2	2	7	6
Physical Abuse	1	1	0	1	0	1	0	0	1	3
Sexual Abuse	0	0	0	0	0	0	0	0	0	0
Unnecessary Restraint	0	0	0	0	0	0	0	0	0	0
Other Abuse	0	0	0	0	0	0	0	1	0	1
TOTAL	3	2	4	6	1	3	2	4	10	15

Monitoring – IDR conducted 27 monitoring visits at 9 facilities.

Monitoring Project – CRMNF Marion

- The facility has been decertified but continues to operate with fewer people receiving services.
- Staffing shortages continue to be at a critically low level, including inadequate staffing to cover the 1:1 level of supervision and general supervision of the units.
- There was a death, currently under investigation, that occurred during the decertification process. The individual was on a group outing when she passed away.
- Groups that are to be led by administrative staff are consistently not being provided.
- IDR staff continue to monitor and advocate for appropriate placement.

Advocate

Individual Representation

Referenced in 2.1



Success Story – Goal 1:

At EPCC, IDR reviewed the Know Your Rights coloring book with the youth. After the meetings, IDR was on the unit and one resident, who is 12, reported EPCC refused to allow her to access her personal books (young adult novels) unless she is on full privilege level. She flipped to the page about her right to have her personal belongings, then proclaimed that EPCC was violating her rights by restricting her access to her books. IDR discussed her options with her, and she requested assistance with filing a grievance, which was provided to her. She completed the form and cited the Indiana Code for that specific right, which she obtained from the list in the back of the coloring book.

GOAL 2: BREAKING DOWN BARRIERS TO ENSURE RIGHTS ARE RESPECTED AND SUPPORTS ARE AVAILABLE FOR PERSONS WITH DISABILITIES TO PARTICIPATE IN AN EQUITABLE AND INCLUSIVE SOCIETY.

PRIORITIES TO ADDRESS:

2.1. Advocate on behalf of individuals with disabilities in the areas of abuse and neglect, civil rights, discharge from institutions, education, employment, health care, justice, self-determination, and voting.

Educate

Materials – Resolving Problems VR

The Employment and PSP Teams created and published a series of 4 fact sheets, “[Resolving Problems with Vocational Rehabilitation Services](#).” The documents are available in English and Spanish.



Advocate

Individual Advocacy Case Data

Individual Advocacy in FY2023	Q1 Opened	Q1 Closed	Q2 Opened	Q2 Closed	Q3 Opened	Q3 Closed	Q4 Opened	Q4 Closed	YTD Open	YTD Closed
AND Advocacy/Discharge	9	7	7	14	7	3	11	7	27	28
Civil Rights	14	16	15	19	12	12	15	11	44	46
Education	16	7	26	20	8	14	1	6	43	33
Employment	9	11	10	12	11	13	12	13	31	36
Health Care	7	4	9	8	7	7	3	4	19	16
Self-Determination	4	4	11	2	9	12	6	11	21	17
TOTAL	59	49	78	75	54	61	48	52	239	237

Individual Representation Select Outcomes

Adrian - Education

“Adrian’s” mother contacted IDR to address concerns that he was being placed in a restraint chair and needed his IEP revised. IDR also learned that Adrian had been removed from school. IDR successfully advocated for the student to be returned to school, receive compensatory time, and address the mother’s concerns.

Andrea - Employment

After “Andrea” graduated high school in May, she wanted to go to college in a different state with support from VR. Because her stated employment goal did not require post-secondary education, VR denied assistance to attend the out of state program. Thanks to IDR’s thorough technical assistance regarding how to prepare for mediation with VR, Andrea successfully self-advocated and was approved to attend the program with assistance from VR.

Greg - Employment

Two years ago, “Greg” requested reasonable accommodations from his employer, including installing a hoist to help him lift heavy objects necessary to perform his job. His employer did not follow through on Greg’s request, so he contacted IDR. Since the statute of limitations had expired, IDR provided technical assistance for Greg to resubmit his reasonable accommodation request which was granted this time.



Kaylin – Education

“Kaylin’s” mother contacted IDR for assistance with due process with the Indiana Department of Education (IDOE). Kaylin was preparing to be discharged from a residential placement and appropriate alternative school placement arrangements had not been made. IDR assisted Kaylin in receiving a successful resolution with the IDOE, including being admitted to an alternative school placement and receiving transportation to her new program.

Rachel – Health Care

Following a visit to the ER in which “Rachel” was not provided with an American Sign Language (ASL) interpreter or other means of effective communication, she contacted IDR. Because of IDR’s advocacy, the hospital implemented systemic changes, including providing a refresher training on effective communication during annual in-service, working to ensure quality provision of video remote interpreting, and tracking future complaints to monitor frequency of effective communication concerns.

Sharon – Civil Rights

After being denied service at a restaurant while accompanied by her service animal, “Sharon” contacted IDR. IDR successfully advocated for Sharon to be a patron of the restaurant with her service animal and for the company to provide additional training to its staff.

Systemic Litigation

Indiana Protection and Advocacy Services Commission v. Indiana Family and Social Services Administration et al (1:22-cv-00906-JRS-TAB; Southern District of Indiana)

In light of significant improvement in the time that criminal defendants who have been adjudicated incompetent to stand trial must wait to receive competency restoration services, the parties have entered discussions to determine if it is possible to resolve this litigation without the necessity of further court intervention. Those conversations are ongoing.

Advocacy Projects

- Diversity in Hiring
 - The research paper based on the data collected is currently under review and will be revised based on recommendations received. In upcoming quarters, Tash Crespo will seek to publish the article in a law review or academic journal.
- Melissa Keyes attended the Mental Health America Regional Policy Meeting to hear about initiatives important to the mental health community and connect with policymakers from other states about Indiana’s emergency detention initiatives.

Policy Advocacy

Melissa Keyes is meeting with multiple stakeholders to discuss concerns with HEA 1006, a bill that amended Indiana’s emergency detention laws.



2.2. Advocate for ending sheltered workshops and increasing competitive integrated employment.

Educate

No current education initiatives tied to this project.

Monitor and Investigate

Monitor DDRS Employment Systems Transformation Plan

On August 1, IDR attended DDRS's Shared Outcomes follow-up meeting regarding its CIE transition plan. On August 4, IDR and the Center for Public Representation (CPR) met with DDRS regarding potential changes to Medicaid waiver service definitions as the agency implements its CIE transition plan. IDR and CPR provided feedback about DDRS's proposed definitions, and again met with DDRS on August 17 to discuss their feedback. Another implementation check-in meeting occurred on September 12. Participants discussed potential training standards for the providers of new CIE-based waiver services. DRS has implemented many of IDR and CPR's recommendations.

Pre-Employment Transition Services

On September 7, Emily Munson attended a stakeholder listening session about pre-employment transition services (pre-ETS). The listening session was sponsored by PCG and stakeholder feedback will be transmitted to VR anonymously. VR hopes to learn how it can improve pre-ETS across the state.

Disability Employment Technical Assistance Center Meeting

On July 31, Emily Munson participated in a quarterly meeting of ACL's Disability Employment Technical Assistance Center's (DETAC) Grantee Advisory Committee. Emily is the only P&A representative who participates in the DETAC Grantee Advisory Committee; other committee members include representatives of centers for independent living, university centers for excellence in developmental disabilities, state developmental disability councils, and the TBI community.

Indiana Employment First Cross Council Summit

IDR's Executive Director, Melissa Keyes, Legal Director Tom Crishon, and several Commission members including Ronelle Johnson, Ray Lay, and Shanese Simmons attended the summit to discuss the state's efforts to support employment for people with disabilities. Following the summit, Melissa Keyes sent comments to the summit organizers about how to make future meetings more accessible and accommodating to people with disabilities.

Advocate

No current advocacy initiatives tied to this project.



2.3. Advocate for access to Home and Community-Based Services (HCBS).

Educate

Presentation

Emily Munson presented to 35 staff of the Office of the State Long-Term Care Ombudsman about IDR and their common interests.

Monitor and Investigate

Monitoring Project – State HCBS Transition Plan and Settings Rule Implementation

IDR continues to submit public comments regarding the heightened scrutiny of HCBS settings that are presumed to be institutional in nature. This quarter, IDR addressed the heightened scrutiny review of four assisted living facilities: The Lodge, Heritage Woods, Bridgepointe Gardens, and The Brentwood at Hobart.

Advocate

Policy Advocacy

Systems Outreach

- On August 31, Emily Munson and Tash Crespo participated a monthly coaching call for the NCAPPS Self-Direction Learning Collaborative. They also attended the culmination of the Learning Collaborative, a Summit on September 19.
- Emily Munson and Tash Crespo continue to meet with DRS and other advocates with disabilities regarding the potential expansion of self-directed services for Medicaid waiver beneficiaries. The most recent work group meeting occurred on September 14 and focused on the potential roles of case managers, support brokers, and providers of Information & Assistance services.

Public Comments

- IDR submitted four letters to FSSA about the heightened scrutiny review of four assisted living facilities that are presumed institutional pursuant to the federal HCBS Settings Rule.
- On August 14, IDR provided the U.S. Department of Health and Human Services with public comments about proposed changes to the regulations implementing the Older Americans Act.

2.4. Advocate for the expansion of knowledge and use of supported decision-making/less restrictive alternatives to guardianship.

Educate

Presentation

- Justin Schrock, former IDR client, Jamie Beck, and Jamie's former legal guardian, Dan Stewart, participated in a panel discussion for 103 attendees regarding Supported Decision-Making during the annual Heart to Heart conference hosted by Indiana Family to Family.
- Melissa Keyes presented to 140 DRS staff about self-determination and supported decision making.



Technical Assistance – IDR provided consultation or technical assistance to over 25 organizations or entities regarding guardianship and self-determination.

Monitor and Investigate

Monitoring Project – Court Filings

IDR continues to review court cases of guardianships filed since the implementation of Indiana’s SDM bill. In collaboration with attorneys from Indiana Legal Services, IDR has requested and received data from the Indiana Office of Court Services regarding adult guardianship cases filed beginning in November 2017 to assess implementation of the Indiana’s SDM law passed and implemented in 2019.

Advocate

Individual Representation Select Outcomes

Alison – Self-Determination

As “Alison’s” guardian and mother began to experience health concerns, Alison contacted IDR to explore alternatives to guardianship. With IDR’s assistance and support from her mother, Alison successfully petitioned to terminate the guardianship of her person and estate.

Betty – Self-Determination

When her guardian made decisions she did not agree with, “Betty” contacted IDR. With IDR’s assistance, Betty successfully petitioned for the termination of her guardianship. In review of the final accountings, IDR discovered that Betty’s guardian could not account for approximately \$4,300 in SSDI funds they received on her behalf. Although Betty decided not to take further action on the matter, she did receive assistance from IDR in appointing a healthcare representative of her choosing.

Nathan – Self-Determination

After IDR helped “Nathan” terminate the guardianship of his person and estate, he wanted to establish a healthcare representative. IDR prepared the document for Nathan to appoint his wife as his healthcare representative and father-in-law as a secondary representative for him to have notarized at his convenience.

Advocacy Projects

- CYVYC Transition-Aged Youth – IDR supported its youth ambassadors in presenting with other CYVYC youth ambassadors about their experiences in the program. IDR provided technical assistance to the youth ambassadors about their projects.
- Advanced Directives for People with ID/DD – IDR partnered with an external pro bono attorney and Tangram to provide advanced directive services to 7 families at an advanced directives clinic. IDR is continuing to seek partners in underrepresented communities to provide advanced directive services. IDR also hosted a booth at the SAI Picnic; see Goal 3.1 for details.



Policy Advocacy

Legislative Advocacy

- Melissa Keyes continues to work with members of the Probate Section of ISBA on recommendations for modernizing Indiana’s guardianship code.
- Melissa Keyes convened several meetings with stakeholders, including our CYVYC youth ambassadors to discuss how best to support meaningful implementation of HEA 1591 (2023), which required case conference committee meetings to discuss decision-making skills and alternatives to guardianship starting in high school. IDR and others provided feedback to IDOE on its educational materials. The group is now looking at available resources and identifying gaps.

Press

Justin Schrock and IDR client Tyler Christopher were interviewed for Bloomberg Law’s latest article in the series [“In the Name of Protection.”](#)

2.5. Advocate to ensure elections are accessible to voters with disabilities.

Educate

Digital Media – Hoosiers Vote

	Q1	Q2	Q3	Q4
Percent of website visits to a voting-related webpage	90%	25%	62%	37.5%
Percent of website visits to single most frequented voting-related webpage	75%	16%	35%	22.5%
Single most frequented voting-related webpage	Vote Early	Voter Registration	Vote Early	Update or Confirm Registration

Presentations

- Paige Benner presented the “Voter Empowerment Training” for 20 life skill students at Ben Davis High School.
- Kristin Dulaney presented the “Voter Empowerment Training” for 14 individuals with brain injury in collaboration with the Brain Injury Association of Indiana.
- Kristin Dulaney hosted the presentation, “Beyond the Ballot” with speaker Grace Kestler for 5 people. The event received press as noted below.

Monitor and Investigate

Monitoring – Polling Place Accessibility Surveys

IDR prepared to launch polling place accessibility surveys in FY 2024 Q1 in [partnership with the United States Attorney’s Office for the Southern District of Indiana.](#)



Advocate

Press

IDR was featured on the [Public News Service](#) for its event “Beyond the Ballot” in which Grace Kestler, an elected official with lived experience as a person with a disability; gave a non-partisan, non-political information session about how to get involved in the full election process.

Workgroups

- Kristin Dulaney has served as the Co-Chair of the REV UP Election Accessibility Toolkit Committee since May. The Toolkit and promotional materials have been submitted to the American Association of People with Disabilities for finalization.
- The Count Us IN Voting Coalition has resumed meetings and IDR intends to attend as often as possible.

Success Story – Goal 2:

“Cindy” contacted IDR when her request for a reasonable accommodation was denied; Cindy is blind and asked a store associate for assistance with shopping. IDR successfully advocated for the store to implement policies to provide reasonable accommodations to blind patrons and train their staff accordingly.

GOAL 3: SERVING AS A PARTNER IN RIGHTS ISSUES BY SUPPORTING INDIVIDUALS AND ORGANIZATIONS LED BY PEOPLE WITH DISABILITIES, THOSE FROM MARGINALIZED COMMUNITIES, AND PEOPLE WITH LIVED EXPERIENCES.

PRIORITIES TO ADDRESS:

3.1. Provide easily accessible and equitable paths for the public to contact IDR for advocacy needs and to find information, referrals, and resources.

Educate

I/R and Website

	Q1	Q2	Q3	Q4	Total
Intake Requests	643	852	665	710	2,870
Information & Referrals	17	13	99	242	371
Website Sessions	186,566	8,456	20,186	9,916	225,124



Presentations

Presentation topics are noted throughout this report.

	Q1	Q2	Q3	Q4	Total
Presentations	14	6	8	7	26
Attendees	722	157	1,035	235	1,866

Events

- Jim Hutton attended Art in the Park - Supporting Financial Health, Crime Prevention, and Re-Entry” on August 5 and spoke with 8 attendees.
- Several IDR staff hosted a booth at the Self-Advocates of Indiana annual picnic on September 15 (photo below). The booth resulted in:
 - 100 conversations
 - 27 voter engagement photos
 - 3 advanced directive conversations
 - 1 voter registration check
 - Collaboration with Marion County Clerk



IDR staff enjoying the SAI Picnic. Front row: Tash Crespo, Carmen Ledezma, and Kristin Dulaney. Middle row: Tina Frayer, Shari Stites, and Justin Schrock. Back row: Melissa Keyes and Sam Adams.



Monitor and Investigate

No monitoring/investigating activities tied to this priority.

Advocate

No current advocacy initiatives tied to this project.

3.2. Support the legislative and policy work and meaningful inclusion of people with disabilities, those from marginalized communities, and people with lived experiences on issues that align with IDR's mission, vision, and values.

Educate

Event

Carmen Ledezma hosted a virtual booth at the Family to Family “Heart to Heart” conference and connected with 21 attendees.

Monitor and Investigate

No monitoring/investigating activities tied to this priority.

Advocate

Workgroups

- In August, Melissa Keyes and Emily Munson joined the Family Employment First Coalition (FEFC). Funded by DDRS and administered by IIDC, the FEFC has been tasked with developing CIE outreach materials for individuals with disabilities and their family members. FEFC members meet monthly.
- Emily Munson continued to Chair the Indianapolis Mayor's Advisory Committee on Disability (MAC-D), hosting the group's first in-person meeting in more than three years on September 20. The MAC-D continues to advocate for the hiring of a disability services liaison within the Mayor's Office; the position has been vacant since 2022.

Success Story – Goal 3:

IDR's Intake Team responded to 2,870 requests in FY 2023 which is 25% more contacts than IDR received in FY 2022 (2,281). IDR continues to be committed to ensuring accessible and equitable pathways for public contact.



Active Workgroups

Workgroup	Goal
Diversity Roundtable of Indianapolis	DEI Goal 3
Indiana State Bar Association Diversity Committee	DEI Goal 3
ISBA Diversity CLE Committee	DEI Goal 3
Facility-Based Human Rights Committees	P&O 1.2
Mortality Review Committee (MRC)	P&O 1.2
NDRN Residential Facilities Community of Practice	P&O 1.2
Back Home in Indiana Alliance Steering Committee	P&O 2.1
Carmel Advisory Committee on Disability	P&O 2.1
Disability Employment Technical Assistance Center (DETAC) Grantee Advisory Workgroup	P&O 2.1
Division of Disability and Rehabilitative Services (DDRS) Advisory Council	P&O 2.1
Fair Housing Center of Central Indiana Board of Directors	P&O 2.1
Family Employment First Coalition	P&O 2.1
Fishers Advisory Committee on Disability	P&O 2.1
Indiana Association of People Supporting Employment First (INAPSE) Public Policy Committee	P&O 2.1
Indiana Council Against Senior Exploitation (IN-CASE)	P&O 2.1
Indianapolis Mayor's Advisory Council on Disability (MAC-D)	P&O 2.1
Medicaid All Hands	P&O 2.1
Mental Health, Addictions, and Criminal Justice Collaboration Workgroup	P&O 2.1
Vocational Rehabilitation (VR) Commission	P&O 2.2
Center for Youth and Adults with Conditions of Childhood (CYACC) Advisory Board	P&O 2.3
Health Care Justice Coalition (Long-Term Care Coalition)	P&O 2.3
National Center on Advancing Person-Centered Practices and Systems' Self-Directed Learning Collaborative	P&O 2.3
House Enrolled Act 1591 Implementation Group	P&O 2.4
Indiana Adult Guardianship State Taskforce (WINGS)	P&O 2.4
Indiana Supported Decision-Making Coalition	P&O 2.4
Indiana Traumatic Brain Injury Advisory Board	P&O 2.4
National Coalition for a Civil Right to Counsel	P&O 2.4
Uniform Guardianship Act Subcommittee for Probate Review Committee	P&O 2.4
Indiana Voting Coalition	P&O 2.5



REV UP Advisory Committee	P&O 2.5
REV UP Election Accessibility Toolkit Committee	P&O 2.5
IIDC Advisory Council	P&O 3.1
PANDA Improvement Workgroup	P&O 3.1
Governor's Council for People with Disabilities	P&O 3.2
HIVMM Coalition	P&O 3.2
Indiana Advisory Committee to the US Commission on Civil Rights	P&O 3.2
International Initiative for Disability Leadership	P&O 3.2
National Alliance on Mental Illness (NAMI)-Indiana Public Policy Committee	P&O 3.2
National Disability Rights Network (NDRN) – CEO Meetings, Legal Director Meetings	P&O 3.2
Transition Partners of Northeast Indiana	P&O 3.2
United States Attorney's Office (USAO) Disability Rights Roundtable	P&O 3.2



Acronyms

List of Common Acronyms

504 -	Section 504 of the Rehabilitation Act of 1973-504
ACF -	Administration for Children and Families
ACLU -	American Civil Liberties Union
ADA -	Americans with Disabilities Act
AIDD -	Administration on Intellectual and Developmental Disabilities
APS -	Adult Protective Services
ARC -	State and local organizations for developmental disability advocacy
ARTICLE 7 -	Special Education Regulations (Indiana)
BDDS -	Bureau of Developmental Disabilities Services
BQIS -	Bureau of Quality Improvement Services
CEO -	Chief Executive Officer
CIH Waiver -	Community Integration and Habilitation Waiver
CMS -	Center for Medicare and Medicaid Services
CPR -	Center for Public Representation
CRMNF -	Comprehensive Rehabilitative Management Needs Facility
CYVYC	Center on Youth Voice/Youth Choice
DCC -	IDR Diversity and Cultural Competency Workgroup
DCS -	Department of Child Services
DD -	Developmental Disabilities
DD Act -	Developmental Disabilities Assistance and Bill of Rights Act
DD Council -	Developmental Disabilities Council
DDRS -	Division of Disability and Rehabilitative Services
DMHA -	Division of Mental Health and Addictions
DOC -	Indiana Department of Correction
DOE -	Indiana Department of Education
EEOC -	Equal Employment Opportunity Commission
FBA -	Functional Behavioral Assessment
GCPD -	Governor's Council for People with Disabilities
HAVA -	Help America Vote Act
HMM -	HIV Modernization Movement
HRSA -	Health Resources and Services Administration
I&R -	Information and Referral
ICF -	Intermediate Care Facility
ICRC -	Indiana Civil Rights Commission
ICLU -	Indiana Civil Liberties Union



ID -	Intellectual Disability
IDD -	Intellectual or Developmental Disabilities
IDR -	Indiana Disability Rights
IDEA -	Individuals with Disabilities Education Act (Federal)
IDOH -	Indiana Department of Health
IIDC/Institute -	The Indiana Institute on Disability and Community
IN*SOURCE -	Indiana's Parent Training Information Project
IPE -	Individual Plan for Employment
LD -	Learning Disability
MI -	Mental Illness
NDRN -	National Disability Rights Network
OCR -	Office of Civil Rights
OMB -	Office of Management and Budget
OMPP -	Office of Medicaid Policy and Planning
P&A -	Protection & Advocacy System
PPR -	Program Performance Report
PRTF -	Psychiatric Residential Treatment Facility
PSF -	Private Secure Facility
PTSD -	Post-Traumatic Stress Disorder
RSA -	Rehabilitation Services Administration
RULE7 -	Part of Nursing Home Regulations (Indiana) concerning the facility's requirements for programming for MR residents used in QMRP-D Training
SAI -	Self-Advocates of Indiana
SAMHSA -	Substance Abuse and Mental Health Services Administration
SDM -	Supported Decision-Making
SGL -	Supervised Group Living
SSA -	Social Security Administration
TA -	Technical Assistance
TASC -	Training and Advocacy Support Center
TBI -	Traumatic Brain Injury
UCEDD -	University Centers for Excellence in Developmental Disabilities
USDOE -	United States Department of Education
VA -	Veterans Affairs
VR/Voc Rehab -	Vocational Rehabilitation Services



IDR Teams

- Abuse, Neglect, and Discharge (AND)
- Civil Rights
- Education
- Employment
- Health Care
- Policy and Special Projects (PSP)
- Self-Determination
- Representative Payee

IDR Staff

Please visit <https://www.in.gov/idr/staff/our-staff/> to view a current staff list.

Grant Programs

CAP -	Client Assistance Program
PAAT -	Protection & Advocacy for Obtaining Assistive Technology
PABSS -	Protection & Advocacy for Beneficiaries of Social Security
PADD -	Protection & Advocacy for Persons with Developmental Disabilities
PAIMI -	Protection & Advocacy for Individuals with Mental Illness
PAIR -	Protection & Advocacy for Individual Rights
PATBI -	Protection & Advocacy for Persons with Traumatic Brain Injury
PAVA -	Protection & Advocacy for Voting Access

State Hospitals

LCH -	Larue Carter Hospital
LSH -	Logansport State Hospital
EPCC -	Evansville Psychiatric Children's Center
ESH -	Evansville State Hospital
MSH -	Madison State Hospital
RSH -	Richmond State Hospital

FFY 2023 BUDGET - AMENDED	FY 2023	Q1	Q2	Q3	Q4	Difference
	10/01/22-09/30/23	10/01/22-12/31/22	1/1/23-3/31/23	4/1/23-6/30/23	7/1/23-9/30/23	
INCOME/AVAILABLE FUNDS	5,013,082.53	4,290,735.62	2,959,910.33	2,399,495.22	2,668,051.64	
<i>Federal Grants</i>	<i>4,601,484.25</i>	<i>3,962,567.07</i>	<i>2,507,971.55</i>	<i>1,962,470.04</i>	<i>1,924,467.21</i>	
FFY 2022 (spend/obligate by 9/30/2023)	1,776,154.79	887,966.03	266,124.84	32,602.34	0.00	
FFY 2023 Received (spend by 9/30/2024+)	1,178,179.46	1,371,549.04	2,241,846.71	1,929,867.70	1,924,467.21	
FFY 2023 Estimated Additional (spend by 9/30/2024+)	1,647,150.00	1,703,052.00	0.00	0.00	0.00	
<i>Non-Federal Grants</i>	<i>411,598.28</i>	<i>328,168.55</i>	<i>451,938.78</i>	<i>437,025.18</i>	<i>743,584.43</i>	
Program Income/Atty Fees (Restricted)	10,000.00	300.00	4,450.00	0.00	0.00	
Program Income/Atty Fees (Unrestricted)	60,000.00	105,068.77	238,245.82	238,243.77	238,243.77	
Non-Federal Income/Unrestricted Balance	194,745.85	194,745.85	194,745.85	194,745.85	194,745.85	
GCPD Disability Law Fellow - Direct bill	112,637.50	0.00	0.00	0.00	0.00	
2022 IBF Community Empowerment Grant	34,214.93	28,053.93	14,497.11	4,035.56	0.00	
State Agency Contingency Fund					310,594.81	
EXPENSES						
Personnel Costs	3,219,971.85	563,112.63	968,024.29	727,996.16	781,652.82	179,185.95
SALARY (+SS)*	2,184,058.73	410,748.84	703,298.88	536,689.59	564,130.72	-30,809.30
BENEFITS*	695,368.44	91,029.54	167,121.84	111,435.69	116,253.27	209,528.10
PERF	239,686.68	55,108.13	94,261.93	72,141.74	74,064.82	-55,889.94
501 Retiree Medical Expenses	33,858.00	0.00	0.00	5,130.00	24,624.00	4,104.00
Contracted Workers*	50,000.00	4,106.96	0.00	0.00	0.00	45,893.04
Deferred Compensation (Hoosier START) State Match	12,000.00	2,115.81	3,341.64	2,599.14	2,580.01	1,363.40
Misc. (e.g., background checks, workers comp, unemployment)	5,000.00	3.35	0.00	0.00	0.00	4,996.65
Travel	37,500.00	17,516.60	10,458.54	12,400.29	6,137.55	-9,012.98
In-State (Mileage, Car Rentals, Per Diem, Hotels, etc)	25,000.00	12,289.98	7,426.37	8,312.97	6,231.57	-9,260.89
Out-of-State (Travel, Hotel, Per Diem, etc)*	10,000.00	5,226.62	3,032.17	4,087.32	-94.02	-2,252.09
Commission and MHAC	2,500.00	0.00	0.00	0.00	0.00	2,500.00
Operations	332,747.84	99,477.25	83,176.44	70,373.50	67,642.07	12,078.58
Rent (\$9,641/mo)	115,701.75	28,925.43	48,209.04	19,283.62	28,925.43	-9,641.77
IOT (hardware, software, IOT services, website hosting)	70,783.05	35,821.96	10,785.85	21,134.91	16,779.95	-13,739.62
HUMAN RESOURCES/SPD*	20,000.00	3,604.72	2,757.54	4,451.90	3,574.02	5,611.82
Centralized Accounting & PeopleSoft Financial Software*	20,000.00	5,809.56	4,418.68	8,837.34	5,554.24	-4,619.82
Phone (ATT, Landline/1-800)	20,000.00	4,316.13	1,449.50	2,896.91	2,272.63	9,064.83
On-site storage (new office space)	2,700.00	675.00	1,125.00	450.00	675.00	-225.00
Verizon Cell Phones	16,000.00	3,498.82	2,416.47	4,950.97	3,298.24	1,835.50
Hinkley- water (\$96.92/month)	1,163.04	128.67	140.86	11.97	129.86	751.68
Office Equipment Rentals (copier, postal system)	3,500.00	623.93	1,070.31	483.97	656.54	665.25
Post Master (Courier Service, Postage, Mailing Services)	5,000.00	899.17	866.70	622.99	1,256.36	1,354.78
Employee Reimbursement for Postage	100.00	0.00	0.00	0.00	0.00	100.00
NDRN (Dues, meetings, LRP)	30,000.00	6,488.17	6,729.36	5,565.18	0.00	11,217.29
Koorsen Security (security system)	1,800.00	7,547.15	0.00	0.00	0.00	-5,747.15
Office Supplies	4,000.00	158.78	1,069.21	213.37	421.37	2,137.27
Computer/Printer Supplies	2,000.00	0.00	287.08	0.00	0.00	1,712.92
Interpreter/CART Services/Translator	15,000.00	830.76	1,312.25	1,320.37	1,359.93	10,176.69
Subscription Services (prof. orgs., software, news)	5,000.00	149.00	538.59	150.00	2,738.50	1,423.91
Legal/Program	62,832.00	21,844.46	5,454.29	23,273.64	7,963.86	4,295.75
Litigation Expenses & Records Requests (Filing fees, experts, docs, etc.)	30,000.00	17,304.26	1,386.29	6,370.00	3,470.00	1,469.45
AUTOMON LLC (Case Management)	13,000.00	0.00	0.00	12,849.64	0.00	150.36
Westlaw (legal research)	14,832.00	2,472.00	3,868.00	3,892.00	3,984.00	616.00
Registration Fees (Staff Training)*	5,000.00	2,068.20	200.00	162.00	509.86	2,059.94
Communication/Outreach	37,500.00	667.24	1,850.00	0.00	0.00	34,982.76
Self-Advocate Stakeholder Reimbursement	10,000.00	0.00	0.00	0.00	0.00	10,000.00
IDR Website Redesign	20,000.00	0.00	0.00	0.00	0.00	20,000.00
Conference Exhibits/Tables	2,500.00	0.00	0.00	0.00	0.00	2,500.00
Printing	5,000.00	667.24	1,850.00	0.00	0.00	2,482.76
Misc.	5,000.00	119.98	672.50	188.79	437.37	3,581.36
Misc.	5,000.00	119.98	672.50	188.79	437.37	3,581.36
TOTAL EXPENSES	3,695,551.69	702,738.16	1,069,636.06	834,232.38	863,833.67	225,111.42
TOTAL INCOME	5,013,082.53	4,290,735.62	2,959,910.33	2,399,495.22	2,668,051.64	
	1,317,530.84	3,587,997.46	1,890,274.27	1,565,262.84	1,804,217.97	

FY2023 BUDGET	Q4 - Totals	CAP	PADD	PAIR	PAVA	PABSS	PAIMI	PATBI	REP PAYEE	PAAT	PHWF	IBF	SACF
EXPENSES	7/1/23-9/30/23												
Personnel Costs	781,652.82	21,003.70	196,872.59	74,369.89	24,999.31	24,502.42	167,870.57	36,609.50	83,468.77	3,864.30	38,426.51	6,133.64	103,531.62
SALARY (+SS)*		13,978.85	135,399.63	51,623.18	16,580.39	15,987.17	115,606.96	25,046.12	52,385.05	2,176.41	27,341.34	4,474.00	103,531.62
BENEFITS*		2,520.22	32,549.75	11,002.56	4,425.83	4,103.01	27,306.21	6,650.78	19,301.77	406.52	6,934.66	1,051.96	0.00
PERF		2,114.35	20,901.85	7,915.58	2,436.92	2,907.50	17,633.23	3,845.58	11,350.74	317.08	4,052.95	589.04	0.00
501 Retiree Medical Expenses		2,319.58	7,283.78	3,553.24	1,462.67	1,406.03	6,717.43	928.32	0.00	952.95	0.00	0.00	0.00
Contracted Workers*		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Deferred Compensation (Hoosier START) State Match		70.70	737.58	275.33	93.50	98.71	606.74	138.70	431.21	11.34	97.56	18.64	0.00
Misc. (e.g., background checks, workers comp)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel	6,137.55	159.88	1,644.31	246.85	137.24	197.92	1,489.26	-72.49	1,382.94	4.63	947.01	0.00	0.00
In-State (Mileage, Car Rentals, Per Diem, Hotels, etc)		150.51	1,555.39	211.50	126.80	189.45	1,427.19	551.49	1,093.91	3.97	921.36	0.00	0.00
Out-of-State (Travel, Hotel, Per Diem, etc)*		9.37	88.92	35.35	10.44	8.47	62.07	-623.98	289.03	0.66	25.65	0.00	0.00
Commission and MHAC		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Operations	67,642.07	5,786.89	17,642.68	6,408.15	3,526.14	1,419.42	20,358.64	3,023.88	5,360.10	174.13	3,689.04	253.00	0.00
Rent (\$9891.81/mo; \$9,641/mo)		693.24	7,257.39	2,754.67	1,521.50	691.31	9,873.21	1,390.35	2,995.71	61.70	1,686.35	0.00	0.00
IOT (hardware, software, IOT services, website hosting)		2,039.76	4,608.25	1,612.81	842.51	324.35	4,605.76	728.73	1,081.54	43.83	892.41	0.00	0.00
HUMAN RESOURCES/SPD*		363.92	1,036.82	375.58	171.04	79.67	950.09	164.55	199.12	9.26	223.97	0.00	0.00
Centralized Accounting & PeopleSoft Financial Software*		675.44	1,525.29	533.80	278.91	107.36	1,524.77	241.21	357.61	14.47	295.38	0.00	0.00
Phone (ATT, Landline/1-800)		271.72	625.36	219.27	113.34	44.22	619.92	98.87	153.06	5.92	120.95	0.00	0.00
On-site storage (new office space)		16.17	169.36	64.27	35.51	16.14	230.41	32.44	69.91	1.44	39.35	0.00	0.00
Verizon Cell Phones		426.89	898.73	312.18	170.16	61.99	927.54	142.30	174.78	8.73	174.94	0.00	0.00
Hinkley- water (\$96.92/month)		19.40	40.73	12.87	5.24	2.82	35.12	7.95	1.20	1.29	3.24	0.00	0.00
Office Equipment Rentals (copier, postal system)		150.06	160.95	61.32	31.57	11.63	131.92	21.12	54.05	1.50	32.42	0.00	0.00
Post Master (Courier Service, Postage, Mailing Services)		76.65	326.14	113.49	36.15	26.97	280.00	76.41	273.12	15.64	31.79	0.00	0.00
Employee Reimbursement for Postage		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
NDRN (Dues, meetings)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Koorsen Security (security system)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Office Supplies		10.88	103.25	41.05	137.12	9.84	72.07	16.60	0.00	0.77	29.79	0.00	0.00
Computer/Printer Supplies		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Interpreter/CART Services/Translator		297.46	263.75	92.57	52.23	12.30	311.21	29.48	0.00	2.73	45.20	253.00	0.00
Subscription Services (prof. orgs., software, news)		745.30	626.66	214.27	130.86	30.82	796.62	73.87	0.00	6.85	113.25	0.00	0.00
Legal/Program	7,963.86	4,332.78	1,247.93	424.16	448.80	79.48	971.49	159.90	29.83	11.80	257.69	0.00	0.00
Litigation Expenses & Records Requests (Filing fees, experts, docs, etc.)		3470	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
AUTOMON LLC (Case Management)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Westlaw (legal research; \$554.01/month)		856.42	1,143.70	416.89	196.33	77.68	870.60	154.73	0.00	10.89	256.76	0.00	0.00
Registration Fees (Staff Training)*		6.36	104.23	7.27	252.47	1.80	100.89	5.17	29.83	0.91	0.93	0.00	0.00
Communication/Outreach	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Self-Advocate Stakeholder Reimbursement		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IDR Website Redesign		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Conference Exhibits/Tables		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Printing		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Misc.	437.37	25.77	96.14	29.46	10.03	7.29	119.40	20.94	120.85	3.71	3.78	0.00	0.00
Misc.		25.77	96.14	29.46	10.03	7.29	119.40	20.94	120.85	3.71	3.78	0.00	0.00
TOTAL EXPENSES	863,833.67	31,309.02	217,503.65	81,478.51	29,121.52	26,206.53	190,809.36	39,741.73	90,362.49	4,058.57	43,324.03	6,386.64	103,531.62

IDR Grant Balance

Grant	Date to Spend	Authorized Amt.	Amt. Received	Total Disbursed	Federal (09/21/23)	State (10/16/23)	NOTES
SACF-2024	6/30/2024	\$448,637.00	\$448,637.00	\$138,042.19		\$310,594.81	
Rep Payee 2022 (Y5)	7/31/2024	\$597,962.46	\$597,962.46	\$597,962.46	\$0.00	\$0.00	SPENT DOWN
CAP 2023*	9/30/2024	\$258,015.00	\$258,015.00	\$0.00	\$258,015.00	\$256,040.00	Received one-time supp of \$34,405.00 (new total \$258,015).
PAAT 2023	9/30/2024	\$91,858.00	\$91,858.00	\$65,110.84	\$26,747.16	\$25,886.30	
PABSS 2023 (Y5)	9/30/2024	\$135,540.00	\$135,540.00	\$23,412.48	\$112,127.52	\$117,488.38	6.34% - from final FFY22 allocation.
PADD 2023	9/30/2024	\$702,261.00	\$702,261.00	\$186,007.85	\$516,253.15	\$452,802.10	
PAIMI 2023	9/30/2024	\$647,370.00	\$647,370.00	\$466,208.99	\$181,161.01	\$136,943.71	3.54% +
PAIR 2023*	9/30/2024	\$342,603.00	\$342,603.00	\$181,001.75	\$161,601.25	\$137,941.25	
PATBI 2023	9/30/2024	\$90,169.00	\$90,169.00	\$65,320.10	\$24,848.90	\$14,081.06	Received additional \$653 in Aug. 2023
PAVA 2020	9/30/2024	\$105,261.00	\$105,261.00	\$105,261.00	\$0.00	\$0.00	SPENT DOWN
ACL PHWF 2022	9/30/2024	\$114,000.00	\$114,000.00	\$110,946.80	\$3,053.20	\$513.55	Waiting on error to correct, then will be spent down.
PAIMI 2023 PI Restricted	9/30/2024		\$4,250.00	\$4,250.00		\$0.00	
PADD 2023 PI Restricted	9/30/2024		\$200.00	\$200.00		\$0.00	
CAP 20 PI Restricted	9/30/2024		\$300.00	\$300.00		\$0.00	
SACF-2025	6/30/2025	\$448,637.00		\$0.00			
Rep Payee 2023 (Y1)	7/31/2025	\$649,280.71	\$649,280.71	\$30,496.46	\$618,784.25	\$549,837.16	
PAVA 2021	9/30/2025	\$112,313.00	\$112,313.00	\$112,313.00	\$0.00	\$0.00	SPENT DOWN
PABSS 2024 (Y1)	9/30/2025	\$135,540.00					Waiting on CR NOA and FFY 2024 Budget
PAIMI 2024	9/30/2025	\$647,370.00					Waiting on CR NOA and FFY 2024 Budget
CAP 2024*	9/30/2025	\$223,610.00	\$29,315.00		\$29,315.00		Waiting on final FFY2024 Budget
PAAT 2024	9/30/2025	\$91,858.00	\$12,042.00		\$12,042.00		Waiting on final FFY2024 Budget
PADD 2024	9/30/2025	\$702,261.00	\$96,156.00		\$96,156.00		Waiting on final FFY2024 Budget
PAIR 2024*	9/30/2025	\$342,603.00	\$44,915.00		\$44,915.00		Waiting on final FFY2024 Budget
PATBI 2024	9/30/2025	\$89,516.00	\$12,853.00		\$12,853.00		Waiting on final FFY2024 Budget
PAVA 2022	9/30/2026	\$119,365.00	\$119,365.00	\$13,104.69	\$106,260.31	\$97,251.56	
PAVA 2023	9/30/2027	\$141,043.00	\$141,043.00	\$0.00	\$141,043.00	\$141,043.00	
PAVA 2024	9/30/2028	\$141,043.00	\$18,491.00		\$18,491.00		Waiting on final FFY2024 Budget
GCPD DLF	Unrestricted	\$112,637.50	\$0.00				GCPD Disability Law Fellow; waiting on GCPD PO
Non-Federal	Unrestricted					\$194,745.85	
PADD 2020 PI UR	Unrestricted		\$6,000.00			\$6,000.00	
PADD22 PI UR	Unrestricted		\$15,000.00			\$15,000.00	
PAIMI 2021 PI UR	Unrestricted		\$2,500.00			\$2,500.00	
PAIMI 2022 PI UR	Unrestricted		\$32,175.00			\$32,175.00	
PAIR 2017 PI UR	Unrestricted		\$22,419.92			\$22,419.92	
PAIR 2021 PI UR	Unrestricted		\$56,148.85			\$56,148.85	
PAIR 2023 PI UR	Unrestricted		\$100,000.00			\$100,000.00	[PAIR 2022 PI UR]
PABSS 2023 PI UR	Unrestricted		\$4,000.00			\$4,000.00	[PABSS 2022 PI UR]

IPAS Commission

Mental Health
Advisory Council

Indiana Disability
Rights



Melissa Keyes
Executive Director

Legal

Operations/Fiscal/Travel



Tom Crishon
Legal Director



Scarlett Taylor
Director of
Operations

Attorney(s)

Intake

Investigations

Advocates/Rep Payee



Carmen Ledezma
Paralegal



Sam Adams
Senior Attorney
Civil Rights/
Litigation



Emily Munson
Policy Director
Healthcare/Policy



Daniel Ward
Intake Coordinator



Tina Frayer
Investigations
Coordinator



Amy Jarrett
Advocate
Supervisor



Diane Morris
Administrative
Assistant



Justin Schrock
Staff Attorney
SD



Natasha Crespo
Disability Law
Fellow



Mary Alter
Intake Advocate



Natasha Henry
Advocate/
Investigator



Shari Stites
Advocate



Pennie Williams
Advocate
Rep Payee



Anthony Liggins
Accountant
Payroll



Zaida Maldonado-
Prather
Staff Attorney
ED/Employment



Kristin Dulaney
Advocate
Special Projects
Mgr



Christian Ewoldt
Advocate/
Investigator



Gary Kloczkowski
Advocate



Andrea Whigum
Advocate
Rep Payee



Sarah Frantz
Senior
Accountant



Jim Hutton
Staff Attorney
HC/AND



Bryan Gogg
Disability Law
Fellow



Michelle
Reynolds
Lead Advocate



David McCray
Advocate
Rep Payee



Heidi Lewis
Advocate
Rep Payee

Current Vacancies

Position Number	Position Title
10017045	Attorney Senior
10017052	Legal Analyst 3
10017042	Advocacy Spec1st 2
10017056	Advocacy Spec1st 2
10073195	Advocacy Spec1st 2
10017053	Advocacy Coord 3