



Mental Health Advisory Council (MHAC) Meeting Materials

FY 2023, Quarter 3

Prepared for the
Mental Health Advisory Council (MHAC) Meeting
August 16, 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**

**MHAC Executive Session
Wednesday, August 16, 2023 – 12:00-12:30 pm, EST**

AGENDA

- I. Receive information about prospective appointees (Indiana Code 5-14-1.5-6.1(b)(5))
 - a. Kenisha Peden
 - b. Chelsea Puckett
- II. Discussion of strategy with respect to litigation (Indiana Code 5-14-1.5-6.1(b)(2)(B))

#

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

**Mental Health Advisory Council (MHAC)
Public Meeting – Wednesday, August 16, 2023 – 12:30pm, EST**

AGENDA

- I. Call to Order**
- II. Introduction of Members**
- III. Changes to Agenda**
- IV. Approval of MHAC Minutes* from May 17, 2023**
- V. MHAC Membership and Terms***
 - a. Members with terms expiring:**
 - i. J'Andra Antisdeal – term ends August 30, 2023**
 - b. Two pending applications***
 - i. Kenisha Peden**
 - ii. Chelsea Puckett – held from May 2023 MHAC Meeting**
- VI. IDR Executive Director Report: M. Keyes**
 - a. Quarterly Report (handout)**
 - b. Fiscal Report (handout)**
- VII. Old Business:**
 - a. FFY 2024 Priorities and Objectives***
- VIII. New Business**
 - a. Know Your Rights – PSF Project**
 - b. Discussion Topic: R. Vilensky**
- IX. Comments, announcements, other business**
- X. Next Meeting Date: November 15, 2023 (virtual) – 12:00 pm, EST Executive Session;
12:30 pm, EST Public Meeting**
- XI. Meeting Adjourned**

***Voting Items**

#

Join Zoom Meeting

<https://us06web.zoom.us/j/85109498550?pwd=Nzc2L2U3Mk9PeURwZS9lSHkzeTkyQT09>

Meeting ID: 851 0949 8550

Passcode: 654173

One tap mobile

+13017158592,,85109498550#,,, *654173# US (Washington DC)

Equity Through Advocacy

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

**Mental Health Advisory Council (MHAC)
Executive Session – Wednesday, May 17, 2023 – 12:00pm (EST)**

Executive Session Minutes

An Executive Session was held on Wednesday, May 17, 2023. No topics were discussed other than those identified on the meeting agenda.

#####

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Mental Health Advisory Council (MHAC)
Public Meeting – Wednesday, May 17, 2023 – 12:30pm (EST)

Minutes

MHAC

Attendees: N. Beeman-Cadwallader, S. Brinkman, S. Moore, R. Vilensky,
C. Thomas, K. Wilds; **Absent:** J. Antisdel, J. Loop-Miller, T. Oakerson

IDR

Attendees: K. Dulaney, M. Keyes, D. Morris

Guest: L. Stevens (prospective member)

- I. Meeting was called to order by S. Brinkman at 12:33pm (EST).
- II. Changes to Agenda, if any – No changes noted.
- III. Approval of Minutes from 2-15-2023 – N. Beeman-Cadwallader motioned that the minutes from the 2-15-2023 meeting be approved; S. Brinkman seconded the motion. Motion carried by unanimous voice vote.
- IV. MHAC Membership and Terms*
 - a. S. Brinkman and J. Antisdel terms end on the MHAC on 5-30-2023 and 8-30-2023, respectively.
 - b. L. Stevens, prospective member, gave a brief overview of her background and her interest in becoming a council member. R. Vilensky motioned to approve her appointment to MHAC; N. Beeman-Cadwallader seconded the motion. Motion carried by unanimous voice vote. Appointment is effective immediately. Voting on appointment of S. Bahler was deferred until the next meeting.
 - c. M. Keyes gave an overview to the council of the membership requirements for SAMHSA/PAIMI.
 - d. Officer Elections* - R. Vilensky nominated for MHAC Chair. S. Brinkman motioned to appoint R. Vilensky as Chair; N. Beeman-Cadwallader seconded the motion. Motion carried appointing R. Vilensky as MHAC Chair by unanimous voice vote. N. Beeman-Cadwallader nominated for MHAC Vice-Chair. R. Vilensky motioned to appoint N. Beeman-Cadwallader as Vice-Chair; S. Moore seconded the motion. Motion carried appointing N. Beeman-Cadwallader as Vice-Chair by unanimous voice vote.

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- V. **IDR Executive Director Report – M. Keyes gave an overview of the Quarterly and Fiscal Reports. M. Keyes shared with the council the death of Steve Estes, an IDR staff member. Additionally, M. Keyes shared that Bonnie Bomer, Advocacy Specialist, is retiring from IDR in July. Last, but not least, M. Keyes shared that IDR has created a “Know Your Rights” coloring book for youth in facilities. M. Keyes stated she will provide an electronic copy of the book to council members.**
- VI. **Old Business – IDR will begin working on 2025 Priorities & Objectives.**
- VII. **New Business – K. Dulaney discussed results of the voting survey that was done. C. Thomas discussed her experiences when visiting various voting sites.**
- VIII. **Comments, announcements, other business – N/A.**
- IX. **Next Meeting Date: August 16, 2023 (Virtual)**
- X. **Meeting Adjourned – S. Brinkman motioned that the meeting be adjourned; R. Vilensky seconded the motion. Motion to adjourn meeting carried by unanimous voice vote. Meeting adjourned at 1:24pm (EST).**

#####



Quarterly Report

FY 2023, Quarter 3

Prepared for the
Mental Health Advisory Council (MHAC) Meeting
August 16, 2023

and

Indiana Protection and Advocacy Services (IPAS)
Commission Meeting
August 18, 2023

Equity Through Advocacy

The Protection and Advocacy System for the State of Indiana



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Executive Director's Report

Key Updates

- Bonnie Bomer was awarded the APSE Public Policy Leadership Award on June 15 during the National APSE conference. Bonnie recently retired from IDR in July after 19 years of service.
- Emily Munson was recognized as part of the 2023 class of Indianapolis Business Journal's annual Forty Under 40 honorees.
- IDR welcomed two summer interns: Special Projects Intern Paige Benner and Legal Intern Cecilia Kibada.
- Tom Crishon is now serving as IDR's Ethics Officer.

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

- Please see the Fiscal Report for information on current grant balances and expenses.
- IDR completed all required federal and state quarterly reports. IDR meets regularly with all federal funding agencies.
- IDR timely completed multiple requests from federal funders for information.
- IDR timely completed federal draws.
- IDR completed the 2024 Rep Payee application to start a new 5-year cycle. IDR is working on the 2024 PABSS and PAIMI program applications.

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

- IDR reviewed state and federal grant opportunities. There were no funding opportunities this quarter that fit within IDR's mission.
- Melissa Keyes worked with partners to identify additional funding and support opportunities through private foundations.
- IDR has secured support for state fiscal year 2024 from the State Agency Contingency Fund. IDR Executive Director continues to work with the State Budget Agency to address the impact to IDR's 2023 budget and to determine logistics for future years of support.
- Melissa Keyes is monitoring federal budget discussions in planning for FFY 2024 funding.
- PASS Act was introduced in Congress. The bill would establish a P&A program focused on access to education. Due to funding tied to the new program, it is unlikely to pass.
- IDR currently has 6 vacancies.



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

- IDR's Executive Director responded to 3 appeals in Q3. None of the appeals requested Commission review.
- IDR staff timely completed the state's employee performance review process as well as development of goals for 2023.
- IDR Executive Director negotiated a waiver of the state's remote work policy to allow IDR to continue its own policy.

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 and technical assistance, connections to community resources, and facilitating access to programmatic needs.
- Project-specific updates involving Melissa Keyes are included in the Priorities and Objectives report.
- Melissa Keyes reviewed the comments for FFY 2024 P&Os and started planning for FFY 2025-2027 cycle. ED is working with DD Act partners to collaborate on gathering information for P&Os development.



Diversity, Equity, and Inclusion Report

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

- Melissa Keyes continues to serve on the ISBA Diversity CLE committee.
- Melissa Keyes joined the Center on Community Living and Careers Diversity Advisory Committee.
- IDR staff are reviewing current connections to help inform the development of a DEI focused outreach plan.
- Melissa Keyes connected with several neighborhood Community Centers to provide introductory information.
- IDR staff provided with DEI related training opportunities, including an all-staff training conducted by Tash Crespo on working with LGBTQ+ clients.

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

- IDR is working with the Governor's Office of Equity and Diversity to provide DEI related training opportunities for staff and Commission/MHAC members.
- IDR received several applications for Commission and MHAC membership.
- Amy Jarrett, IDR's DEI and CC Coordinator, received a scholarship that covered travel and registration to a training called Beyond Diversity: Leveraging Emotional Intelligence for Real Equity in the Workplace. She will be updating IDR's internal DEI workgroup on the results of that training.

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's summer interns have been gathering and organizing IDR's outreach efforts for better reporting and strategic outreach efforts.
- Outcomes from IDR's participation on various workgroups are discussed in the Priorities and Objectives report. A full list of workgroups is available in the appendix.
- Melissa Keyes met with 3 representatives from new organizations not previously connected to IDR.
- Tom Crishon attended a program from the Urban League to identify additional opportunities for connections.



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%			17	3%
Not Hispanic	178	94%	197	92%	169	91%			544	92%
Unknown	5	2%	10	5%	13	7%			28	5%
Total	190		213		186				589	

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%			245	42%
Male	107	56%	114	54%	101	54%			322	55%
Other	0	0%	0	0%	1	1%			1	<1%
Unknown	0	0%	7	3%	0	0%			7	1%
Blank	4	2%	0	0%	10	5%			14	2%
Total	190		213		186				589	

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%			7	1%
Black/African American	30	16%	33	15%	24	13%			87	15%
Race Unknown	0	0%	0	0%	0	0%			0	0%
White	143	75%	158	75%	141	76%			442	75%
Blank	4	2%	8	4%	11	6%			23	4%
Two or More Races	10	5%	8	4%	5	3%			23	4%
Native Hawaiian/Other Pacific	0	0%	1	0%	1	<1%			2	<1%
American Indian/ Alaskan Native/ Indigenous	0	0%	0	0%	0	0%			0	0%
Unknown-Declined	1	1%	2	1%	2	1%			5	1%
Total	190		213		186				589	

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%			7	1%
4 to 10	15	8%	21	10%	23	12%			59	10%
11 to 21	46	24%	51	24%	41	22%			138	23%
22 to 40	44	23%	51	24%	43	23%			138	23%
41 to 65	62	33%	69	33%	57	31%			188	32%
66 to 80	14	7%	11	5%	9	5%			34	6%
81 and above	3	2%	3	1%	3	2%			9	2%
Blank	4	2%	2	1%	8	4%			14	2%
Data errors	0	0%	1	0%	1	<1%			2	<1%
Total	190		213		186				589	

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:

The coloring book is complete and has been sent to the printer. Copies are expected to be available in Q4. The book was highlighted by our grants manager for PAIMI at a SAMHSA program meeting.

Monitor and Investigate

Monitoring Project – PRTFs and PSFs

	Q1	Q2	Q3	Q4	Total
Facilities visited	5	3	4		12
Reports filed with overseeing entities	1	0	0		1
Discharges assisted	1	0	0		1

Outcomes:

- IDR continues to monitor residential facilities for rights violations and abuse/neglect allegations.
- IDR continues to have communication with DCS regarding concerns within the PSFs.

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 11 new staff members at the monthly ESH/EPCC New Staff Orientations.

Monitor and Investigate

Rep Payee

IDR presented 11 Rep Payee reviews to SSA which are now in end stages of review.



Investigations

- 16 investigations were opened or still open.
- 3 investigations were conducted; all were partially-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
Death of Patient	0	0	0	2	0	0			0	2
Environmental & Facility Safety	0	1	1	0	0	0			1	1
Medication Errors	0	0	1	1	0	0			1	1
Neglect	2	0	2	2	1	2			5	4
Physical Abuse	1	1	0	1	0	1			1	3
Sexual Abuse	0	0	0	0	0	0			0	0
Unnecessary Restraint	0	0	0	0	0	0			0	0
Other Abuse	0	0	0	0	0	0			0	0
TOTAL	3	2	4	6	1	3			8	11

Monitoring – IDR conducted 27 monitoring visits at 9 facilities.

- IDR monitoring advocates collaborated with RepPayee reviewers during this quarter so that each RepPayee reviewer shadowed monitoring advocates at facilities and/or parts of facilities not typically accessed by the reviewers. This allowed for increased staff training as well as furtherance of relationships amongst IDR personnel.

Monitoring Project – CRMNF Marion

- Environmental concerns, including access to personal belongings, continues to be a concern.
- 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.
 - **Outcome:** This facility is currently under a decertification notice. While under appeal, the residents residing in this facility will be discharged except for 10 individuals who are identified as unable to safely discharge. To date, IDR has attended 25 team meeting to discuss discharge plans.



Advocate

Individual Representation

Referenced in 2.1

Systemic Litigation

Indiana Protection and Advocacy Services Commission et al v. Commissioner, Indiana Department of Correction (1:08-cv-01317-TWP-MJD; Southern District of Indiana)

In January 2016, the parties entered into a Private Settlement Agreement (“PSA”) to resolve the substantive issues in this case. By agreement of the parties, the PSA had been extended on a number of occasions, for various reasons and was set to expire on April 13, 2023.

Before this date, Counsel for the plaintiffs toured the various mental health units currently being operated within the Department of Correction (“DOC”): the New Castle Psychiatric Unit, the Pendleton Treatment Unit, the Special Needs Unit at the Wabash Valley Correctional Facility, and the mental health units at the Indiana Women’s Prison. Personnel responsible for the mental health care of DOC prisoners from both the DOC and the DOC’s health-care provider were present on the tours and were able to respond to inquiries from plaintiffs’ counsel. Counsel for the plaintiffs were also provided documents concerning the provision of services in those mental health units and had the opportunity to discuss the plans of the DOC and its current mental health provider to serve the DOC’s seriously mentally ill population. These plans include the possibility of constructing new units at the Indiana Women’s Prison and the Westville Correctional Facility to better serve seriously mentally ill prisoners and other DOC prisoners with special needs. Counsel for the plaintiffs also had the opportunity to discuss the expansion of other mental health services to DOC prisoners.

The DOC has incorporated many of the substantive requirements of the PSA into its Health Care Services Directives, including the requirement that seriously mentally ill prisoners generally not be housed in restrictive housing for more than 30 days and that patients in the mental health units must generally be offered the opportunity to participate in 10 hours of out-of-cell therapeutic programming each week. Given the progress made by the DOC since the PSA became effective, the plaintiffs decided to take no steps to attempt to extend the PSA and allowed its expiration on April 13, 2023. With the PSA expiration, the case will be closed.

Press

Emily Munson was interviewed by [WFYI](#) about the possible establishment of a direct support provider abuse registry.



Success Story – Goal 1:

As the SSA Representative Payee grant year ended, IDR's review team successfully addressed every review assigned by SSA. No reviews were carried over unfinished into the new grant year.

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

Presentations

- Melissa Keyes served as a panelist during the “2023 National Association of School Resource Officer School Safety Conference” for 59 people.

Materials- Housing Reasonable Accommodations

- The Civil Rights and PSP Team created and published “[How to Request a Housing Reasonable Accommodation](#)” Factsheet in English and Spanish. Additional editable templates are available for use in making requests.

Events

- Bonnie Bomer attended the Indianapolis Disability Talent Showcase organized by Work to Include on April 20 and May 18.



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			23	24
Civil Rights	14	16	15	19	12	12			41	47
Education	16	7	26	20	8	14			50	41
Employment	9	11	10	12	11	13			30	36
Health Care	7	4	9	8	7	7			23	19
Self-Determination	4	4	11	2	9	12			24	18
TOTAL	59	49	78	75	54	61			191	185

Individual Representation Select Outcomes

Abigail– Employment

When "Abigail," a person who receives social security income and has chronic migraines, obtained full-time employment as a student programming coordinator, she asked VR to help her purchase equipment to set-up a home office. VR declined to open her case, so she contacted IDR. Because of IDR's advocacy, VR opened Abigail's case and provided her with the necessary equipment.

Arianna – Employment

To retain her job, "Arianna" needed to receive a cochlear implant and was struggling to receive funding from VR to cover the cost of the surgery. IDR assisted Arianna in getting an Individualized Plan for Employment which included covering her cochlear implant. Since the procedure required Arianna to shave part of her head, IDR also helped Arianna ensure VR would cover the surgery at a later date – following her impending wedding.

Ivory– Civil Rights

After "Ivory" was denied the ability to bring her service animal to her daughter's school, IDR attorney contacted the school district. IDR helped Ivory provide the necessary documentation and Ivory was then able to bring her service animal. The school was also provided with education and ultimately updated their service animal policies.



Jackson– Education

“Jackson”, is a 9-year-old student who had recently had an incident with the School Resource Officer (SRO) that resulted in injury to Jackson. His parents requested IDR advocacy to ensure the SRO had additional training regarding working with children with special needs. Because of IDR’s involvement, the school agreed to re-train their SROs and the Chief of Police over the summer.

Logan – Education

“Logan’s” parents contacted IDR with concerns about how Logan’s school handled one of his recent seizures. They also shared concerns with the use of the school’s safety chair and lack of support for Logan’s use of a communication device. IDR provided advocacy to support Logan in receiving a new IEP that resulted in an improved seizure plan, modified when it is appropriate to use the safety chair, and made sure Logan’s teacher knew how to interact with his communication device.

Tillie – Civil Rights

“Tillie” is legally blind, had to walk through two parking lots with no sidewalk access to reach her mailbox. In order for USPS to move her mailbox, they required documentation from Tillie’s doctor. The doctor refused; because of IDR advocacy, the doctor completed the necessary paperwork and Tillie’s paperwork was moved closer to her home.

Tisha- Civil Rights

“Tisha,” a recipient of social security, previously had a grace period from her housing provider, allowing her to pay rent a few days late due to the timing of her monthly social security check. After a new property manager took over, the accommodation was discontinued. IDR assisted Tisha in acquiring a new lease with the reasonable accommodation provided.

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)

Plaintiff appealed the court’s denial of a motion for preliminary injunction. Defendants provided updated data showing significant decrease in wait times for competency restoration services. The parties dismissed the appeal and are conducting additional discovery on reduced wait times and discussing settlement.

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.



- Twice Exceptional Students Project
 - Bryan Gogg has continued researching his fellowship project regarding the education of twice exceptional students.

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

Educate

Presentation

- Melissa Keyes presented “Developing and Integrated Employment Service System” event for 48 attendees.

Materials – Competitive Integrated Employment (CIE) Initiative

- The seven fact sheets are now available on [IDR's website](#) in English, Spanish, and American Sign Language.
- Videos highlighting individuals that have obtained competitive integrated employment and discussing their experience are available, as well, on [IDR's website](#) and [YouTube channel](#).

Monitor and Investigate

Monitor DDRS Employment Systems Transformation Plan

On June 12, IDR and the Center for Public Representation (CPR) met with DDRS regarding the implementation of its CIE transition plan. IDR and CPR discussed Oregon's transition from sheltered work to CIE and provided DDRS with recommendations for amending CIE and CIE-related service definitions in Indiana.

Advocate

No current advocacy initiatives tied to this project.

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

Educate

No current education activities tied to this priority.

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 Adams Woodcrest and the Byron Health Center. Because these facilities are located on the same campus as a skilled nursing facility, the HCBS Settings Rule requires the State to conduct heightened scrutiny review to ensure that the assisted living facilities are not operating in an institutional manner, but instead are encouraging the integration of their residents into the local community.



Advocate

Policy Advocacy

Systems Outreach

- IDR submitted 2 letters to FSSA about the heightened scrutiny review of two assisted living facilities that are presumed institutional pursuant to the federal HCBS Settings Rule.
- On April 18 and 20, Emily Munson and Tash Crespo participated in the third learning session of the NCAPPS Self-Direction Learning Collaborative. They also engaged in a debriefing session with additional team participants during the Long-Term Care Advocate Coalition meeting on May 12.
- Emily Munson and Tash Crespo continue to meet with DDRS 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 June 8 and focused on the development of a Scope of Work document for entities wishing to apply to be fiscal intermediaries.

Public Comments

- On June 30, IDR provided the U.S. Department of Health and Human Services (HHS) with public comments regarding Medicaid's notice of proposed rulemaking to expand beneficiaries' ability to access critical Medicaid services.
- On June 30, IDR's Executive Director signed onto the Bazelon Center's letter asking HHS to expand Medicaid's notice of proposed rulemaking to include mental health services.

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

Educate

Presentations

- Justin Schrock and former IDR client, Nick Clouse, were panelists on a virtual webinar for 500 people titled *Guardianship – They Don't Have to Last Forever*, hosted by the National Center for State Courts.
- Justin Schrock presented alongside Nick Parker, staff attorney with the Indiana Supreme Court Adult Guardianship Office, for 25 people on supported decision-making and alternatives to guardianship at the 2023 annual conference hosted by the Indiana Civil Rights Commission and Indiana Governor's Council for People with Disabilities.
- Melissa Keyes presented "Incorporating Supported Decision-Making Principles into Your Practice" for 240 nationally certified guardians and other professionals that will take place during the NGA Colloquium on Guardianship.
- Melissa Keyes presented "Ensuring Olmstead's Promise of Informed Choice to Live in Integrated Community Settings" for 55 people.

Technical Assistance – IDR provided consultation or technical assistance to over 20 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. IDR is collaborating with attorneys from ILS on a bulk data request looking at guardianships filed since the SDM law was enacted in 2018.

Advocate

Individual Representation Select Outcome

Giorgio – Self-Determination

“Giorgio” and his mother requested help establishing healthcare decision-making supports. IDR assisted Giorgio in executing a healthcare representative form to allow his parents to be his healthcare representatives, and his mother as his representative for SSA matters.

Advocacy Projects

- CYVYC Transition-Aged Youth – IDR supported its youth ambassadors in submitting a presentation to a virtual conference later in the summer. That proposal was accepted and IDR will assist the youth in preparing their presentation.
- Advanced Directives for People with ID/DD – IDR conducted an in-person advanced directive clinic and met with clients virtually to create advanced directives. IDR partnered with an external pro bono attorney and Tangram to provide advanced directive services to seven families. IDR is continuing to seek partners in underrepresented communities to provide advanced directive services.

Policy Advocacy

Legislative Advocacy

- Melissa Keyes is meeting with multiple stakeholders to discuss concerns with HEA 1006, a bill that amended Indiana’s emergency detention laws.
- Melissa Keyes continues to work with members of the Probate Section of ISBA on recommendations for modernizing Indiana’s guardianship code.

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%	
Percent of website visits to single most frequented voting-related webpage	75%	16%	35%	
Single most frequented voting-related webpage	Vote Early	Voter Registration	Vote Early	



Monitor and Investigate

Monitoring – Polling Place Accessibility Surveys

- 11 community partners surveyed 26 polling sites in 10 counties during Primary Election early voting.
- IDR shared 35 recommendations for accessibility improvement with County Clerks.

Advocate

Systemic Litigation

American Council of the Blind of Indiana et al. v. Indiana Election Commission et al. (1:20-cv-03118-JMS-MJD; U.S. District Court, Southern District of Indiana)

The remote accessible vote by mail (RAVBM) tool with email return began with the May 2023 primary election. IDR is monitoring the implementation of RAVBM tool and compliance with the settlement agreement.

Press

- IDR was featured in two full-length episodes of the NFB-Newsline, highlighting the new RAVBM tool and sharing disability voting rights. Use these links to watch the replay of [episode 1](#) and [episode 2](#).
- The new RAVBM tool continued to receive coverage, including from [Wish TV](#) and [The Journal Gazette](#).

Success Story – Goal 2:

After their public school continued suspending “Karamat” and “Khidhr,” twin 6-year-old students with developmental disabilities, their mom contacted IDR.

The school had found the behavior to be manifestations of their disabilities, but continued suspending them, in violation of the IDEA. IDR filed a complaint with the Department of Education; the investigation found the school had violated the twins’ rights and ordered the school to provide compensatory time and complete a corrective action plan.



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		2,160
Information & Referrals	17	13	99		129
Website Sessions	186,566	8,456	20,186		215,208

Presentations

Presentation topics are noted throughout this report.

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

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

Presentation

See Success Story – Goal 3 below.

Professional Development

IDR's 2 summer interns started their work during Q3. In addition to their projects, they are shadowing IDR staff on various policy initiatives.

Monitor and Investigate

No monitoring/investigating activities tied to this priority.



Advocate

Press

Melissa Keyes was interviewed by [TheBody](#) about [HB 1198](#).

System Advocacy

- Melissa Keyes advocated for and helped revise NDRN Board bylaws to strengthen the inclusion of people with disabilities and those from marginalized communities within board membership.
- IDR staff advocated for ACL to change their data collection requirements regarding demographic questions for members of the LGBTQ+ community.

Success Story – Goal 3:

Kristin Dulaney hosted a panel on Election Accessibility the Association of the Clerk of Circuit Courts of Indiana Annual Conference. The panelist, Emily Munson and IDR former client Dee Ann Hart, shared their experiences as voters and poll workers with disabilities and highlighted relevant election law. IDR received thanks from several Clerks after the panel ended and the organizers expressed particular appreciation for hearing real experiences instead of theoretical content.



Active Workgroups

Workgroup	Goal
Center on Community Living & Careers Diversity Advisory Committee	DEI Goal 3
Diversity Roundtable of Indianapolis	DEI Goal 3
Indiana State Bar Association Diversity Committee	DEI Goal 3
ISBA Diversity CLE Committee	DEI Goal 3
Ivy Tech Diversity Workgroup	DEI Goal 3
BQIS Incident Reporting Process Workgroup Collaborative Workgroup	P&O 1.2
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
ResCare Marion BDDS Transition Meeting	P&O 1.2
ADA-Indiana Steering Committee	P&O 2.1
Back Home in Indiana Alliance Steering Committee	P&O 2.1
Carmel Advisory Committee on Disability	P&O 2.1
Department of Justice Civil Rights Roundtable	P&O 2.1
Disability Employment Technical Assistance Center (DETAC) Grantee Advisory Workgroup	P&O 2.1
DDRS Advisory Council	P&O 2.1
Fair Housing Center of Central Indiana Board of Directors	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
Indiana Counsel for Kids Coalition	P&O 2.1
Indiana Department of Transportation (INDOT) Americans with Disabilities Act (ADA) Community Advisory Working Group	P&O 2.1
Indiana Educational Equity Coalition	P&O 2.1
Indianapolis Mayor's Advisory Council on Disability (MAC-D)	P&O 2.1
Institutional Modernization Workgroup	P&O 2.1
Medicaid All Hands	P&O 2.1
Mental Health, Addictions, and Criminal Justice Collaboration Workgroup	P&O 2.1
Paratransit Next Steps Taskforce	P&O 2.1
RISE Peer Mentor	P&O 2.1
Waiver re-design workgroups	P&O 2.1
DDRS Advisory Council CIE Workgroups	P&O 2.2



Vocational Rehabilitation (VR) Commission	P&O 2.2
Work to INclude Advisory Committee	P&O 2.2
Work to INclude Coalition	P&O 2.2
Center for Youth and Adults with Conditions of Childhood (CYACC) Advisory Board	P&O 2.3
CMS Stakeholders	P&O 2.3
Health Care Justice Coalition	P&O 2.3
LifeCourse Ambassador Group	P&O 2.3
LifeCourse Partners in Transformation Chapter Group	P&O 2.3
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
Center for Youth Choice, Youth Voice (CYCYV)	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
PANDA Improvement Workgroup	P&O 3.1
TASC Advisory Group (TAG) Advocacy Working Group	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
Indiana Disability Advisory Group - State of Indiana Office Chief Equity, Inclusion and Opportunity	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
NDRN – CEO Meetings, Legal Director Meetings	P&O 3.2
NDRN Technical Assistance Advisory Committee	P&O 3.2
Self-Advocate Innovation Collaborative	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

FY2023 BUDGET	Q3 - Totals	CAP	PADD	PAIR	PAVA	PABSS	PAIMI	PATBI	REP PAYEE	PAAT	PHWF
EXPENSES	4/1/22-6/30/22										
Personnel Costs	727,996.16	46,704.32	167,128.08	73,025.51	20,565.93	18,411.60	139,251.93	46,710.44	184,848.75	13,043.10	10,288.84
SALARY (+SS)*		34,552.82	123,836.97	55,933.72	14,858.92	13,975.28	102,478.43	33,903.68	134,180.90	9,965.01	7,420.69
BENEFITS*		7,397.69	26,104.32	9,377.34	3,659.82	2,520.33	22,118.86	8,101.76	26,952.03	1,694.53	1,852.39
PERF		4,587.21	16,584.77	7,451.41	1,967.17	1,852.17	14,163.02	4,535.92	17,929.65	1,333.25	988.14
501 Retiree Medical Expenses		0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,130.00	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
Deferred Compensation (Hoosier START) State Match		166.60	602.02	263.04	80.02	63.82	491.62	169.08	656.17	50.31	27.62
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
Travel	12,400.29	195.22	1,406.08	162.98	162.06	89.15	2,323.85	4,164.29	3,270.83	248.57	377.26
In-State (Mileage, Car Rentals, Per Diem, Hotels, etc)		169.58	1,089.73	95.79	142.27	72.92	2,220.51	1,048.47	2,881.33	217.53	374.84
Out-of-State (Travel, Hotel, Per Diem, etc)*		25.64	316.35	67.19	19.79	16.23	103.34	3,115.82	389.50	31.04	2.42
Commission and MHAC		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Operations	70,373.50	4,323.67	13,147.77	8,145.36	2,441.86	2,328.36	13,764.93	5,760.20	17,428.56	1,661.81	1,370.98
Rent (\$9891.81/mo; \$9,641/mo)		1,301.64	3,746.81	2,304.39	711.57	620.93	3,814.30	1,419.27	4,737.99	534.16	92.56
IOT (hardware, software, IOT services, website hosting)		1,322.13	4,178.79	2,274.20	551.54	768.80	4,423.28	787.04	5,711.16	486.34	631.63
HUMAN RESOURCES/SPD*		297.10	895.58	497.23	116.29	149.65	966.11	161.36	1,160.33	97.63	110.62
Centralized Accounting & PeopleSoft Financial Software*		558.37	1,741.24	965.42	242.64	317.68	1,837.36	368.47	2,359.57	209.16	237.43
Phone (ATT, Landline/1-800)		181.23	571.92	312.31	75.72	105.68	606.36	107.70	782.17	66.94	86.88
On-site storage (new office space)		30.38	87.44	53.77	16.61	14.49	89.00	33.11	110.57	12.47	2.16
Verizon Cell Phones		309.61	977.84	533.04	128.97	180.60	1,036.81	182.91	1,337.87	114.10	149.22
Hinkley- water (\$96.92/month)		0.79	2.53	1.00	0.32	0.32	2.65	0.47	3.43	0.18	0.28
Office Equipment Rentals (copier, postal system)		24.32	98.77	53.57	16.08	13.54	84.88	33.07	137.85	19.88	2.01
Post Master (Courier Service, Postage, Mailing Services)		42.64	113.06	71.41	21.19	22.68	132.98	33.15	155.92	17.13	12.83
Employee Reimbursement for Postage		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
NDRN (Dues, meetings)		214.18	616.20	379.18	117.09	102.17	627.91	2,625.72	779.60	87.90	15.23
Koorsen Security (security system)		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Office Supplies		0.00	-2.05	0.00	215.42	0.00	0.00	0.00	0.00	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
Interpreter/CART Services/Translator		30.74	96.16	684.04	224.17	25.14	106.69	5.90	113.25	11.85	22.43
Subscription Services (prof. orgs., software, news)		10.54	23.48	15.80	4.25	6.68	36.60	2.03	38.85	4.07	7.70

FY2023 BUDGET	Q3 - Totals	CAP	PADD	PAIR	PAVA	PABSS	PAIMI	PATBI	REP PAYEE	PAAT	PHWF
Legal/Program	23,273.64	1,141.00	3,284.26	2,019.96	623.75	6,914.30	3,343.67	1,244.10	4,153.23	468.22	81.15
Litigation Expenses & Records Requests (Filing fees, experts, docs, etc.)		0	0.00	0.00	0.00	6,370.00	0.00	0.00	0.00	0.00	0.00
AUTOMON LLC (Case Management)		867.35	2,496.69	1,535.53	474.15	413.76	2,541.66	945.73	3,157.15	355.94	61.68
Westlaw (legal research; \$554.01/month)		262.71	756.09	465.09	143.62	125.32	769.97	286.45	956.26	107.80	18.69
Registration Fees (Staff Training)*		10.94	31.48	19.34	5.98	5.22	32.04	11.92	39.82	4.48	0.78
Communication/Outreach	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
IDR Website Redesign		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
Printing		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Misc.	188.79	0.00	0.00	0.00	92.79	0.00	0.00	0.00	96.00	0.00	0.00
Misc.		0.00	0.00	0.00	92.79	0.00	0.00	0.00	96.00	0.00	0.00
TOTAL EXPENSES	834,232.38	52,364.21	184,966.19	83,353.81	23,886.39	27,743.41	158,684.38	57,879.03	209,797.37	15,421.70	12,118.23

IDR Grant Balance
FFY 2023 Q3

Grant	Date to Spend	Authorized Amt.	Amt. Received	Total Disbursed	Federal (07/12/23)	State (07/25/23)	NOTES
IBF 2022 CEG	6/12/2023	\$35,000.00	\$35,000.00	\$30,964.44		\$4,035.56	
Rep Payee 2021	7/31/2023	\$566,090.33	\$566,090.33	\$566,090.33	\$0.00	\$0.00	SPENT DOWN
CAP 2022*	9/30/2023	\$223,477.00	\$223,477.00	\$190,874.66	\$32,602.34	\$27,159.39	
PAAT 2022	9/30/2023	\$84,949.00	\$84,949.00	\$84,949.00	\$0.00	\$0.00	SPENT DOWN
PABSS 2022	9/30/2023	\$144,776.00	\$144,776.00	\$144,776.00	\$0.00	\$0.00	SPENT DOWN
PADD 2022	9/30/2023	\$676,954.00	\$676,954.00	\$676,954.00	\$0.00	\$0.00	SPENT DOWN
PAIMI 2022	9/30/2023	\$625,258.00	\$625,258.00	\$625,258.00	\$0.00	\$0.00	SPENT DOWN
PAIR 2022*	9/30/2023	\$325,379.00	\$325,379.00	\$325,379.00	\$0.00	\$0.00	SPENT DOWN
PATBI 2022	9/30/2023	\$73,191.00	\$73,191.00	\$73,191.00	\$0.00	\$0.00	SPENT DOWN
PAVA 2019	9/30/2023	\$98,209.00	\$98,209.00	\$98,209.00	\$0.00	\$0.00	SPENT DOWN
SACF-2024	6/30/2024	\$448,637.00	\$448,637.00			\$448,637.00	
Rep Payee 2022 (Y5)	7/31/2024	\$597,962.46	\$597,962.46	\$588,378.68	\$9,583.78	\$12,821.43	
CAP 2023*	9/30/2024	\$223,610.00	\$223,610.00	\$0.00	\$223,610.00	\$223,610.00	
PAAT 2023	9/30/2024	\$91,858.00	\$91,858.00	\$63,387.67	\$28,470.33	\$27,622.06	
PABSS 2023	9/30/2024	\$135,540.00	\$135,540.00	\$2,620.53	\$132,919.47	\$131,124.66	6.34% - from final FFY22 allocation.
PADD 2023	9/30/2024	\$702,261.00	\$702,261.00	\$44,946.34	\$657,314.66	\$620,635.98	
PAIMI 2023	9/30/2024	\$647,370.00	\$647,370.00	\$335,804.83	\$311,565.17	\$280,153.61	3.54% +
PAIR 2023*	9/30/2024	\$342,603.00	\$342,603.00	\$126,519.34	\$216,083.66	\$204,019.75	
PATBI 2023	9/30/2024	\$89,516.00	\$89,516.00	\$40,333.56	\$49,182.44	\$42,240.37	
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	\$78,540.62	\$35,459.38	\$25,913.97	
PAIMI 2023 PI Restricted	9/30/2024		\$4,250.00			\$0.00	
PADD 2023 PI Restricted	9/30/2024		\$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					
Rep Payee 2023 (Y1)	7/31/2025	\$649,280.71	\$649,280.71		\$649,280.71	\$649,280.71	
PAVA 2021	9/30/2025	\$112,313.00	\$112,313.00	\$107,042.19	\$5,270.81	\$1,096.20	
PABSS 2024 (Y1)	9/30/2025	\$135,540.00					Level funded from FFY 2023. Application due.
PAIMI 2024	9/30/2025	\$647,370.00					Level funded from FFY 2023. Application due.
PAVA 2022	9/30/2026	\$119,365.00	\$119,365.00	\$0.00	\$119,365.00	\$119,153.25	

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	0.00	
<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>0.00</i>	
FFY 2022 (spend/obligate by 9/30/2023)	1,776,154.79	887,966.03	266,124.84	32,602.34		
FFY 2023 Received (spend by 9/30/2024+)	1,178,179.46	1,371,549.04	2,241,846.71	1,929,867.70		
FFY 2023 Additional (spend by 9/30/2024+)	1,647,150.00	1,703,052.00	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>0.00</i>	
Program Income/Atty Fees (Restricted)	10,000.00	300.00	4,450.00	0.00		
Program Income/Atty Fees (Unrestricted)	60,000.00	105,068.77	238,245.82	238,243.77		
Non-Federal Income/Unrestricted Balance	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		
2022 IBF Community Empowerment Grant	34,214.93	28,053.93	14,497.11	4,035.56		
EXPENSES						
<i>Personnel Costs</i>	<i>3,219,971.85</i>	<i>563,112.63</i>	<i>968,024.29</i>	<i>727,996.16</i>	<i>0.00</i>	<i>960,838.77</i>
SALARY (+SS)*	2,184,058.73	410,748.84	703,298.88	536,689.59		533,321.42
BENEFITS*	695,368.44	91,029.54	167,121.84	111,435.69		325,781.37
PERF	239,686.68	55,108.13	94,261.93	72,141.74		18,174.88
501 Retiree Medical Expenses	33,858.00	0.00	0.00	5,130.00		28,728.00
Contracted Workers*	50,000.00	4,106.96	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		3,943.41
Misc. (e.g., background checks, workers comp, unemployment)	5,000.00	3.35	0.00	0.00		4,996.65
<i>Travel</i>	<i>37,500.00</i>	<i>17,516.60</i>	<i>10,458.54</i>	<i>12,400.29</i>	<i>0.00</i>	<i>-2,875.43</i>
In-State (Mileage, Car Rentals, Per Diem, Hotels, etc)	25,000.00	12,289.98	7,426.37	8,312.97		-3,029.32
Out-of-State (Travel, Hotel, Per Diem, etc)*	10,000.00	5,226.62	3,032.17	4,087.32		-2,346.11
Commission and MHAC	2,500.00	0.00	0.00	0.00		2,500.00
<i>Operations</i>	<i>332,747.84</i>	<i>99,477.25</i>	<i>83,176.44</i>	<i>70,373.50</i>	<i>0.00</i>	<i>79,720.65</i>
Rent (\$9,641/mo)	115,701.75	28,925.43	48,209.04	19,283.62		19,283.66
IOT (hardware, software, IOT services, website hosting)	70,783.05	35,821.96	10,785.85	21,134.91		3,040.33
HUMAN RESOURCES/SPD*	20,000.00	3,604.72	2,757.54	4,451.90		9,185.84
Centralized Accounting & PeopleSoft Financial Software*	20,000.00	5,809.56	4,418.68	8,837.34		934.42
Phone (ATT, Landline/1-800)	20,000.00	4,316.13	1,449.50	2,896.91		11,337.46
On-site storage (new office space)	2,700.00	675.00	1,125.00	450.00		450.00
Verizon Cell Phones	16,000.00	3,498.82	2,416.47	4,950.97		5,133.74
Hinkley- water (\$96.92/month)	1,163.04	128.67	140.86	11.97		881.54
Office Equipment Rentals (copier, postal system)	3,500.00	623.93	1,070.31	483.97		1,321.79
Post Master (Courier Service, Postage, Mailing Services)	5,000.00	899.17	866.70	622.99		2,611.14
Employee Reimbursement for Postage	100.00	0.00	0.00	0.00		100.00
NDRN (Dues, meetings, LRP)	30,000.00	6,488.17	6,729.36	5,565.18		11,217.29
Koorsen Security (security system)	1,800.00	7,547.15	0.00	0.00		-5,747.15
Office Supplies	4,000.00	158.78	1,069.21	213.37		2,558.64
Computer/Printer Supplies	2,000.00	0.00	287.08	0.00		1,712.92
Interpreter/CART Services/Translator	15,000.00	830.76	1,312.25	1,320.37		11,536.62
Subscription Services (prof. orgs., software, news)	5,000.00	149.00	538.59	150.00		4,162.41
<i>Legal/Program</i>	<i>62,832.00</i>	<i>21,844.46</i>	<i>5,454.29</i>	<i>23,273.64</i>	<i>0.00</i>	<i>12,259.61</i>
Litigation Expenses & Records Requests (Filing fees, experts, docs, etc.)	30,000.00	17,304.26	1,386.29	6,370.00		4,939.45
AUTOMON LLC (Case Management)	13,000.00	0.00	0.00	12,849.64		150.36
Westlaw (legal research)	14,832.00	2,472.00	3,868.00	3,892.00		4,600.00
Registration Fees (Staff Training)*	5,000.00	2,068.20	200.00	162.00		2,569.80
		0.00				
<i>Communication/Outreach</i>	<i>37,500.00</i>	<i>667.24</i>	<i>1,850.00</i>	<i>0.00</i>	<i>0.00</i>	<i>34,982.76</i>
Self-Advocate Stakeholder Reimbursement	10,000.00	0.00	0.00			10,000.00
IDR Website Redesign	20,000.00	0.00	0.00	0.00		20,000.00
Conference Exhibits/Tables	2,500.00	0.00	0.00	0.00		2,500.00
Printing	5,000.00	667.24	1,850.00	0.00		2,482.76
<i>Misc.</i>	<i>5,000.00</i>	<i>119.98</i>	<i>672.50</i>	<i>188.79</i>	<i>0.00</i>	<i>4,018.73</i>
Misc.	5,000.00	119.98	672.50	188.79		4,018.73
TOTAL EXPENSES	3,695,551.69	702,738.16	1,069,636.06	834,232.38	0.00	1,088,945.09
TOTAL INCOME	5,013,082.53	4,290,735.62	2,959,910.33	2,399,495.22	0.00	
	1,317,530.84	3,587,997.46	1,890,274.27	1,565,262.84	0.00	

BUDGET - PROPOSED	FY 2024	Q1	Q2	Q3	Q4	Difference
	10/01/23-09/30/24	10/01/23-12/31/23	1/1/24-3/31/24	4/1/24-6/30/24	7/1/24-9/30/24	
INCOME/AVAILABLE FUNDS	5,436,356.55	0.00	0.00	0.00	0.00	
<i>Federal Grants</i>	<i>4,377,090.88</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	
FFY 2023 (spend/obligate by 9/30/2024)	1,093,601.17					
FFY 2024 Authorized (spend by 9/30/2025+)	909,688.71					
FFY 2024 Estimated Additional (spend by 9/30/2025+)	2,373,801.00					
<i>Non-Federal Funds</i>	<i>1,059,265.67</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	<i>0.00</i>	
Program Income/Atty Fees (Restricted)	5,000.00					
Program Income/Atty Fees (Unrestricted)	298,245.82					
GCPD Disability Law Fellow - Direct bill	112,637.00					
Non-Federal Income/Unrestricted Balance	194,745.85					
State Agency Contingency Fund	448,637.00					
EXPENSES						
Personnel Costs	3,881,968.51	0.00	0.00	0.00	0.00	3,881,968.51
SALARY (+SS)*	2,434,404.66					2,434,404.66
BENEFITS	1,070,407.73					1,070,407.73
PERF	271,466.12					271,466.12
501 Retiree Medical Expenses	37,962.00					37,962.00
Contracted Workers	50,000.00					50,000.00
Deferred Compensation (Hoosier START) State Match	12,728.00					12,728.00
Misc. (e.g., background checks, workers comp, unemployment)	5,000.00					5,000.00
Travel	52,500.00	0.00	0.00	0.00	0.00	52,500.00
In-State (Mileage, Car Rentals, Per Diem, Hotels, etc)	35,000.00					35,000.00
Out-of-State (Travel, Hotel, Per Diem, etc)	15,000.00					15,000.00
Commission and MHAC	2,500.00					2,500.00
Operations	364,026.23	0.00	0.00	0.00	0.00	364,026.23
Rent (\$9,642/mo)	115,701.75					115,701.75
IOT (hardware, software, IOT services, website hosting)	112,474.48					112,474.48
HUMAN RESOURCES/SPD	20,000.00					20,000.00
Centralized Accounting & PeopleSoft Financial Software	25,000.00					25,000.00
Phone (ATT, Landline/1-800)	15,000.00					15,000.00
On-site storage (new office space)	2,700.00					2,700.00
Verizon Cell Phones	16,000.00					16,000.00
Hinkley- water (\$96.92/month)	800.00					800.00
Office Equipment Rentals (copier, postal system)	3,000.00					3,000.00
Post Master (Courier Service, Postage, Mailing Services)	5,000.00					5,000.00
Employee Reimbursement for Postage	50.00					50.00
NDRN (Dues, meetings, LRP)	30,000.00					30,000.00
Koorsen Security (security system)	1,800.00					1,800.00
Office Supplies	3,500.00					3,500.00
Computer/Printer Supplies	1,000.00					1,000.00
Interpreter/CART Services/Translator	10,000.00					10,000.00
Subscription Services (prof. orgs., software, news)	2,000.00					2,000.00
Legal/Program	62,832.00	0.00	0.00	0.00	0.00	62,832.00
Litigation Expenses (Filing fees, experts, docs, etc.)	30,000.00					30,000.00
AUTOMON LLC (Case Management)	13,000.00					13,000.00
Westlaw (legal research)	14,832.00					14,832.00
Registration Fees (Staff Training)	5,000.00					5,000.00
Communication/Outreach	14,500.00	0.00	0.00	0.00	0.00	14,500.00
Self-Advocate Stakeholder Reimbursement	10,000.00					10,000.00
Conference Exhibits/Tables	1,500.00					1,500.00
Printing	3,000.00					3,000.00
Misc.	2,000.00	0.00	0.00	0.00	0.00	2,000.00
Misc.	2,000.00					2,000.00
TOTAL EXPENSES	4,377,826.74	0.00	0.00	0.00	0.00	4,377,826.74
TOTAL INCOME	5,436,356.55	0.00	0.00	0.00	0.00	
	1,058,529.81	0.00	0.00	0.00	0.00	



Proposed P&Os Development Strategy

Goal

To determine the systemic issues that people with disabilities, including those who are multiply marginalized, would like IDR to address from 2025 to 2027.

Inclusion Goals

IDR will intentionally reach out to underrepresented and minority populations to ensure their input is included and valued in the P&Os development process. According to 2020 U.S. Census data, 40% of Indiana residents identify as a race other than white.¹ Additionally, 6% of Indiana residents speak a language other than English in the home.²

Based on that information, IDR will use the goals outlined here as a minimum criterion for evaluating its inclusion practices in the P&Os development.

P&Os Development Inclusion Goals			
	FY2021 Actual	FY2021 Goal	FY2024 Goal
Participants Who Identify as a Person with a Disability	55%	51%	At least 51%
Participants Who Identify as a Racial Minority	25%	5%	At least 30%
Participants Who Identify as a Language Minority	16%	2%	At least 6%

¹ America Counts Staff. (2021, August 25). *Indiana's: 2020 Census*. Census.gov. United States Census Bureau. <https://www.census.gov/library/stories/state-by-state/indiana-population-change-between-census-decade.html>

² American Community Survey. (2021). *Language Spoken at Home*. Census.gov. United States Census Bureau. <https://data.census.gov/table?q=languages%2Bin%2Bindiana&tid=ACSST1Y2021.S1601>

Equity Through Advocacy

The Protection and Advocacy System for the State of Indiana



Strategy

FY 2024

Consult and conduct outreach with internal and external stakeholder sources as noted in the Timeline section. A lengthy timeline, as well as multiple means to provide feedback, will facilitate participation by minority, underrepresented, and institutionalized populations.

Materials will be published in English and Spanish, as well as additional languages available upon request. Interpreting services will be available upon request for live discussions.

Timeline

- August 2023 – Discuss P&Os strategy proposal at IPAS Commission Meeting.
- September 2023 –Finalize plans for P&Os development.
- October 1, 2023 – FY 2024 begins.
- October 2023-May 2024 – Collect feedback. Update IPAS Commission at scheduled Meetings during this time.
- May 2024 – Provide draft P&Os to IPAS Commission at Meeting and obtain approval to post them for public comment.
- June and July 2024 – Receive public comments. Convene IDR staff and partners to review comments and determine feasibility/resources.
- August 2024 – Vote on proposed FY 2025-2027 P&Os plan by IPAS Commission at Meeting.
- September 2024 – Update IDR staff about final P&Os plan and implementation.
- October 1, 2024 – Begin implementing FY 2025-2027 P&Os.

Implementation

IDR will route final P&Os to relevant teams to begin planning to launch new initiatives. Current teams include:

- Abuse, Neglect, and Discharge
- Civil Rights
- Education
- Employment
- Health Care
- Self-Determination
- Investigations
- Monitoring
- Representative Payee
- Voting

IDR will also partner with other agencies and organizations to achieve common priorities and support initiative which may be led by other disability organizations.



Stakeholder Lists

Internal Stakeholders

Feedback Layer	Timeline	Population Represented
IDR Staff	October	• Agency staff • People with disabilities • Underrepresented minorities
IPAS Commission and MHAC	January	• IPAS Commission and MHAC Members • People with disabilities • Underrepresented minorities
Internal Case Data	February	• Evaluation of agency service demographics and data

External Stakeholders

Feedback Layer	Timeline	Population Represented
IDR Monitoring	November through March	• People with disabilities • People living in institutions • Underrepresented minorities
IDR Representative Payee Beneficiary Interviews	November through March	• People with disabilities • People living in institutions • Underrepresented minorities
Targeted Minority Outreach	November through March	• People with disabilities • Underrepresented minorities
Discussion Leader Peer-to-Peer Groups	January through March	• People with disabilities • Underrepresented minorities
Public Input Survey	January through March	• All stakeholders
Public Comments	June and July	• All stakeholders

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