

Meeting Agenda
SUD OVERSIGHT POLICY BOARD

Wednesday, September 6, 2023 4:00 PM
Board Room - Community Mental Health of Ottawa County
12265 James Street, Holland, MI 49424

1. Call to Order: Chair
2. Roll Call/Introductions: Chair
3. Public Comment: Chair
4. Conflict of Interest: Chair
5. Review/Approval of Agenda-Chair (*Attachment 1*)
Suggested Motion: To approve the September 6, 2023 LRE Oversight Policy Board meeting agenda as presented.
6. Review/Approval of Minutes-Chair (*Attachment 2*)
Suggested Motion: To approve the June 7, 2023 LRE Oversight Policy Board meeting minutes as presented.
7. Finance Report (Maxine Coleman)
 - a. Statement of Activities (*Attachment 3*)
 - b. FY23 Budget Amendment #2 (*Attachment 4*)
Suggested Motion: *The Oversight Policy Board:*
 - (a) Approves the allocation of PA2 funds for the FY23 LRE SUD Budget as presented.
 - (b) Advises and recommends that the LRE Board approve the FY23 non-PA2 fund budgets for SUD services as presented.
8. Old Business
9. New Business
 - a. FY24 Budget Proposal (*Attachment 5*)
Suggested Motion: The Oversight Policy Board:
 - (a) Approves the allocation of PA2 funds for the FY24 LRE SUD Budget as presented
 - (b) Advises and recommends that the LRE Board approve the FY24 non-PA2 fund budgets for SUD services.
 - b. Policy & Procedure Review (*Attachments 6, 7, 8*)
 - c. CMHOC Request for PA2 Special Project funds (*Attachment 9*)
Suggested Motion: To approve Community Mental Health of Ottawa County's request to use reserve Ottawa County PA2 funds in the amount of \$60,000 to fund Recovery Coach Support Services to the Homeless Population in FY2024. This approval is contingent upon all other available funding options (COVID-19 Funds, ARPA Funds, PBIB funds) being applied prior to applying PA2 funds.

- d. N180 Request for FY23 Additional PA2 Funds (*Attachment 10*)
Suggested Motion: LRE Oversight Policy Board approves the transfer of up to \$1.4 million in reserve PA2 funds to Kent County for the purpose of funding two programs (Family Engagement Team and Recovery Management) at Network180 for FY2023 expenditures. This approval is contingent upon N180 exhausting all other available funding options (e.g. Women’s Specialty Grants, COVID-19 Funds, ARPA Funds, PBIP funds) prior to applying any reserve PA2 funds. N180 must provide the final amount needed for this transfer after applying all available funds no later than September 15, 2023.

10. State/Regional Updates (Stephanie VanDerKooi)

- a. CMHAM SUD Conference – September 10 – 12

11. Prevention Updates – Amy Embury

- a. Prevention Procurement
- b. SYNAR (*Attachment 11*)

12. SUD Treatment Updates – Amanda Tarantowski

- a. FY23 Q3 SUD Treatment Evaluation Report
- b. Provider Network
- c. Grants

13. Next Meeting

December 6, 2023 – 4:00 PM
CMHOC Board Room

Meeting Minutes (proposed)
SUD OVERSIGHT POLICY BOARD

Wednesday, June 7, 2023 4:00 PM
 Board Room - Community Mental Health of Ottawa County
 12265 James Street, Holland, MI 49424

CALL TO ORDER

Mr. Patrick Sweeney, LRE Oversight Policy Board Chair, Called the June 7, 2023 meeting to order at 4:04 PM

ROLL CALL/INTRODUCTION– Chair

Present at Roll Call:

MEMBER	P	A	MEMBER	P	A
Martha Burkett	X		David Parnin		x
Shelly Cole-Mickens	X		Stan Ponstein	X	
Mark DeYoung	X		Julie Sanford	x	
Bethany Fisk		X	Andrew Sebolt	X	
Marcia Hovey-Wright		x	Sarah Sobel	X	
Rebecca Lange	X		James Storey	X	
Richard Kanten	X		Patrick Sweeney	X	
Dawn Martin		X	Doug Zylstra	X	

PUBLIC COMMENT

No public comment.

CONFLICT OF INTEREST

No conflict of interest declared.

REVIEW/APPROVAL OF AGENDA

OPB 23-06 Motion: To approve the June 7, 2023, LRE Oversight Policy Board meeting agenda as presented.

Moved by: Ponstein Support: Sebolt

MOTION CARRIED

REVIEW/APPROVAL OF MINUTES

OPB 23-07 Motion: To approve the March 1, 2023, LRE Oversight Policy Board meeting minutes as presented.

Moved by: Ponstein Support: DeYoung

MOTION CARRIED

OLD BUSINESS

Election Officers – Patrick Sweeney

Nomination and Appointment of Secretary

OPB 23-08 Motion: To appoint Sarah Sobel to serve as OPB Secretary.

Moved by: Burkett Support: Lange

MOTION CARRIED

NEW BUSINESS

Our Hope Grant Award – Amanda Tarantowski

COVID-19 grants funds to the behavioral health system have been significantly underspent. As a result, approximately \$2 million dollars were allocated to a treatment and infrastructure grant to increase services. A total of 24 grants were awarded, including a grant to Region 3 in the amount of \$495 thousand. Our Hope submitted an application to expand residential capacity to allow for additional detox for women and add a second provider. Funds will be available in July and must be used by the end of the fiscal year.

SUD 3-Year Strategic Plan – Stephanie VanDerKooi, Amanda Tarantowski, Amy Embury

Ms. VanDerKooi noted that the state requires submission of a SUD Strategic plan every three years. The plan was reviewed with members, and feedback from Board members will be submitted to LRE by June 26 before submitting the plan to the LRE Board and MDHHS.

OPB 23-07 Motion: To accept the LRE 3-Year Strategic Plan (FY24 – 26) as presented and forward to the LRE Board of Directors with a recommendation for approval with the condition that the final plan will be distributed to members no later than close of business June 26, 2023 allowing members to make recommendations for change and reapproval.

Moved by: Ponstein

Support: Kanten

MOTION CARRIED

Prevention Procurement: LRE is currently involved in Prevention Provider Procurement focusing on Block Grant Dollars. 20 percent of block grant funds are required to be spent on prevention. Applications for participation identifies the programs and services in which prevention providers will engage.

LRE Strategic Plan – LRE has developed a three-year strategic plan. Ms. VanDerKooi reviewed the updated agency mission, vision, and value statements. The plan will be presented to the LRE Board for approval in June.

FINANCE REPORT (Maxine Coleman)

Statement of Activities (FY23 through April 30)

Ms. Coleman reviewed the statement of activities. Block grant (prevention, treatment, ARPA, SOR, COVID) expenditures are at 39 percent (expected to be at 58 percent). Providers have reported expected expenditures for year end, and it is anticipated that adequate funds will be available. Providers that have expended all block grant funds have started accessing PA2 funds. It is preferred that all other sources of funding be used prior to using PA2 funds as PA2 can be carried forward.

Medicaid and Healthy Michigan expenditures are slightly under budgeted. The region is anticipating some savings to be carried forward in Medicaid and Healthy Michigan category. There is no area of concern with revenues or expenditures at this time. Budget adjustments will be presented during the September meeting.

STATE/REGIONAL UPDATES (Stephanie VanDerKooi/Mark DeYoung)

HealthWest Leadership Changes – Rich Francisco has been hired to serve as the Executive Director position at HealthWest.

Legislative Action – The grid focuses on legislative activity related substance use disorder and is updated as new legislation is introduced. Recently, two new house bills were introduced that imitate the bills previously introduced by Senator Shirkey (SB 297; SB 298).

The Tobacco Prevention Group will introduce several bills after the summer break toward licensing tobacco products.

Members were encouraged to share this grid where appropriate and were invited to provide information about any legislative activity that might be added.

Past liabilities – LRE Board of Directors Action: During the May Board meeting, a motion passed to pay past liabilities to HealthWest, West Michigan, and N180. Funds have been distributed.

Opiate Settlement – LRE has learned that the PIHP will not receive any settlement funds during FY23 or FY24. The state plans to use the funds for their programs. Municipalities will receive funds.

PHE Unwind – Individuals will need to re-enroll for Medicaid benefits. It is likely that the number of enrollees will decrease resulting in a decline in regional funding. LRE is working with an actuary to better understand the potential impact.

PREVENTION UPDATES – Amy Embury

Prevention Procurement – Proposals are due to the LRE by June 29 at 5:00 PM. An internal team will score the proposals, and selected providers will be informed by the end of July. Proposed budgets will be presented during the September meeting.

SYNAR - There are 907 tobacco retailers in the region. The state conducts a random sampling, and 51 retailers will be checked. Compliance rate results are used to formulate block grant dollar awards.

Regional Trainings –Several trainings across the region focusing on Prevention have been scheduled.

SUD TREATMENT UPDATES – Amanda Tarantowski

FY23 Q2 SUD Treatment Evaluation Report – Ms. Tarantowski reviewed the quarterly reporting. There has been an increase in engaging individuals involved in criminal justice during the quarter. There has been a decrease in the average time spent between episodes of care. There was a 15 percent decrease in opiate use, but a 5 percent increase in methamphetamine. The region is meeting timeliness requirements for getting individuals into medicated assisted treatment.

Grant Updates – Utilizing grant fundings:

- Have been able to place peers in access centers and a public housing complex.
- Peers follow along with individuals who have received naloxone administration.
- Kent county is running an engagement center staffed with peers.
- Mobile health units able to provide MAT
- Exploring ways to decrease the number of drug influenced births in Lake County

NEXT MEETING

September 6, 2023 – 4:00 PM
CMHOC Board Room

Mr. Sweeney asked that Board members review the final LRE SUD Strategic Plan and share any concerns with the group.

OTHER

Mr. Ponstein reported on the CMHA conference; members should work through their respective CMHSP if they wish to attend

Ms. Cole-Mickins inquired about board member participation in the SUD Conference. Ms, VanDerKooi will investigate available funds.

ADJOURN

OPB 23-08 Motion: To adjourn the June 7, 2023 Lakeshore Regional Entity Oversight Policy Board meeting.

Moved: Zylstra

Support: Sobel

MOTION CARRIED

Mr. Sweeney adjourned the June 7, 2023 Lakeshore Regional Entity Oversight Policy Board meeting at 5:26 pm.

Patric Sweeney, OPB Chair

Sarah Sobel, OBP Secretary

**Lakeshore Regional Entity
Substance Use Disorders
FY23 Block Grant Expenditures**

Block Grant	Year Ending	Year To Date		
	9/30/2023	7/31/2023	Budget to Actual	
	FY23 Budget Budget Am 1	FY23 Budget to Date	Actual	Variance
Operating Revenues				
SUD Block Grant (includes SDA)	6,572,632	5,477,193	3,792,623	1,684,571
SUD Block Grant SOR	3,451,558	2,876,298	1,462,364	1,413,934
SUD Block Grant Gambling	171,801	143,168	124,615	18,553
SUD Block Grant COVID	2,462,368	2,051,973	850,018	1,201,956
Drug Free Communities (DFC) Grant	125,000	104,167	100,512	3,655
SUD Block Grant Amer Rescue Plan Act (ARPA)	644,060	536,717	190,050	346,666
Total Operating Revenues	13,427,419	11,189,516	6,520,182	4,669,334
Expenditures - Treatment				
LRE Direct & Regional Administration - Treatment	225,000	187,500	65,447	122,053
LRE Administration - SOR	250,768	208,974	30,524	178,450
LRE Administration - COVID	10,000	8,333	10,000	(1,667)
Treatment Payments to Members				
OnPoint (Allegan Co CMH) - Treatment	454,395	378,663	165,218	213,445
OnPoint (Allegan Co CMH) - SOR	278,375	231,979	47,292	184,687
OnPoint (Allegan Co CMH) - COVID	70,629	58,858	23,956	34,902
OnPoint (Allegan Co CMH) - ARPA	75,000	62,500	2,147	60,353
Healthwest - Treatment	903,290	752,742	454,325	298,416
Healthwest ARPA	25,000	20,833	0	20,833
Healthwest SOR	964,454	803,712	343,506	460,206
Healthwest - COVID	256,015	213,346	136,573	76,773
Network180 - Treatment	2,524,216	2,103,513	1,368,361	735,153
Network 180 - SOR	1,246,476	1,038,730	575,510	463,219
Network 180 - ARPA	175,000	145,833	87,424	58,410
Network180 - COVID	529,537	441,281	143,967	297,314
CMH of Ottawa County - Treatment	858,610	715,508	452,102	263,407
CMH of Ottawa County - SOR	257,295	214,413	24,466	189,947
CMH of Ottawa County - ARPA	200,000	166,667	0	166,667
CMH of Ottawa County - COVID	548,233	456,861	111,334	345,527
West Michigan CMH - Treatment	358,839	299,033	222,592	76,440
West Michigan CMH - SOR	198,900	165,750	85,163	80,587
West Michigan CMH - COVID	52,800	44,000	0	44,000
Expenditures - Prevention				
LRE Direct & Regional Administration - Prevention	229,399	191,166	191,696	(530)
LRE Direct & Regional Administration - COVID	160,000	133,333	73,271	60,062
LRE Direct & Regional Administration - ARPA	22,500	18,750	17,473	1,278
LRE Direct & Regional Administration - Prevention SOR	41,090	34,241	4,219	30,023
LRE Direct Administration - Gambling	50,401	42,001	47,371	(5,371)
LRE Direct Administration - DFC	25,000	20,833	4,050	16,783

Expenditures - Prevention - continued

OnPoint (Allegan Co CMH) - Prevention	214,011	178,343	213,522	(35,179)
OnPoint (Allegan Co CMH) - Prevention SOR	39,000	32,500	22,656	9,844
OnPoint (Allegan Co CMH) - Prevention ARPA	16,666	13,888	16,660	(2,772)
OnPoint (Allegan Co CMH) - Prevention COVID	86,802	72,335	21,872	50,463
Arbor Circle / Pathways - Prevention	175,273	146,061	171,963	(25,902)
Arbor Circle / Pathways - Prevention SOR	25,000	20,833	15,195	5,638
Arbor Circle / Pathways - Prevention Gambling	27,400	22,833	20,437	2,396
Arbor Circle / Pathways - ARPA	31,908	26,590	27,836	(1,246)
Arbor Circle - COVID	212,282	176,902	137,788	39,114
District 10 Health Department - Prevention	57,259	47,716	57,259	(9,543)
District 10 Health Department - SOR	37,200	31,000	20,434	10,566
District 10 Health Department - ARPA	14,766	12,305	8,340	3,965
District 10 Health Department - COVID	57,830	48,192	18,671	29,520
District 10 Health Department - DFC	100,000	83,333	96,462	(13,128)
District 10 Health Department - Gambling	32,000	26,667	10,321	16,345
Family Outreach Center - Prevention	27,467	22,889	27,467	(4,578)
Family Outreach Center - Prevention Gambling	31,000	25,833	21,766	4,067
Family Outreach Center - ARPA	13,930	11,608	0	11,608
Family Outreach Center - COVID	76,284	63,570	23,978	39,592
Kent County Health Department - Prevention	54,839	45,699	54,839	(9,140)
Kent County Health Department - Prevention SOR	65,000	54,167	38,464	15,702
Kent County Health Department - ARPA	16,667	13,889	16,667	(2,778)
Kent County Health Department - COVID	82,431	68,693	3,314	65,378
Mercy Health - Prevention	35,839	29,866	35,733	(5,868)
Mercy Health - COVID	38,293	31,911	17,931	13,980
Mercy Health - ARPA	9,168	7,640	300	7,340
Network 180 - Prevention	79,687	66,406	79,687	(13,281)
Network 180 - COVID	83,431	69,526	30,906	38,620
Ottawa County Health Department - Prevention	16,517	13,764	16,517	(2,753)
Ottawa County Health Department - Prevention SOR	28,000	23,333	14,040	9,294
Ottawa County Health Department - ARPA	8,810	7,342	4,490	2,852
Ottawa County Health Department - COVID	45,873	38,228	13,015	25,213
Community Mental Health of Ottawa County - COVID	51,269	42,724	25,481	17,243
Community Mental Health of Ottawa County - ARPA	8,810	7,342	159	7,183
Public Health Muskegon County - Prevention	294,025	245,021	294,025	(49,004)
Public Health Muskegon County - Prevention Gambling	31,000	25,833	24,192	1,641
Public Health Muskegon County - Prevention SOR	20,000	16,667	7,936	8,731
Public Health Muskegon County - ARPA	9,168	7,640	1,004	6,636
Public Health Muskegon County - COVID	42,671	35,559	22,306	13,253
Wedgwood Christian Services - Prevention	63,966	53,305	63,966	(10,661)
Wedgwood Christian Services - COVID	57,988	48,323	35,478	12,845
Wedgwood Christian Services - ARPA	16,667	13,889	7,551	6,338
Total Expenditures	13,427,419	11,189,516	6,428,613	4,760,903
Total Change in Net Assets	0	0	91,569	(91,569)

As of 8/28/23

**Lakeshore Regional Entity
Substance Use Disorders
FY23 PA2 Expenditures**

	Year Ending	Year To Date		Budget to Actual Variance
	9/30/2023	7/31/2023		
PA2	FY23 Budget Amendment 1	FY23 Budget to Date	Actual	
Operating Revenues				
PA2 Liquor Tax - Current FY	3,249,131	2,707,609	1,018,288	1,689,321
PA2 Liquor Tax - Reserves	0	0	0	0
Total Operating Revenues	3,249,131	2,707,609	1,018,288	1,689,321
Expenditures - Prevention				
OnPoint (Allegan Co CMH) - Prevention	90,039	75,033	0	75,033
Arbor Circle / Pathways - Prevention	283,227	236,023	203,023	32,999
District 10 Health Department - Prevention	48,681	40,568	3,095	37,473
Family Outreach Center - Prevention	35,533	29,611	13,321	16,290
Kent County Health Department - Prevention	267,161	222,634	173,095	49,540
Mercy Health - Prevention	23,818	19,848	23,818	(3,970)
Network 180 - Prevention	270,313	225,261	153,442	71,818
Community Mental Health of Ottawa County	61,000	50,833	35,199	15,635
Ottawa County Health Department - Prevention	75,408	62,840	55,726	7,114
Public Health Muskegon County - Prevention	40,975	34,146	16,165	17,981
Wedgwood Christian Services - Prevention	61,034	50,862	32,112	18,750
Expenditures - Treatment				
Treatment Payments to Members				
OnPoint (Allegan Co CMH)	101,887	84,906	0	84,906
Healthwest	355,144	295,953	95,222	200,731
Network180	1,228,280	1,023,567	482,285	541,281
CMH of Ottawa County	210,615	175,513	103,705	71,807
West Michigan CMH	96,016	80,013	0	80,013
Total Expenditures	3,249,131	2,707,609	1,390,209	1,317,401
Total Change in Net Assets	0	0	(371,921)	371,921

As of 8/28/23

**Lakeshore Regional Entity
Substance Use Disorders
FY23 Medicaid Treatment Expenditures**

Year To Date Through 7/31/23

CATEGORY	CMHSP Medicaid YTD Totals	LRE Admin Med YTD Totals	LRE Medicaid Budget Totals	LRE % of Budget Spent
Total Expenditures for Treatment Services				
	\$ 5,901,359.72	\$ -	\$ 8,907,544	66.25%
Women's Specialty Services	\$ 353,390.03	\$ -	\$ 837,600	42.19%
Other Specialty Services	\$ -	\$ -	\$ -	0.00%
Access Management System	\$ 277,190.53	\$ -	\$ 140,202	197.71%
General Administration	\$ 86,971.31	\$ 72,589.45	\$ 487,276	32.75%
GRAND TOTAL OF SA EXPENDITURES	\$ 6,618,911.59	\$ 72,589.45	\$ 10,372,622	64.51%
SOURCE OF FUNDS				
Medicaid	\$ 6,618,911.59	\$ 72,589.45	\$ 10,372,622	64.51%
Other: Local	\$ -	\$ -	\$ -	0.00%
Other: Federal	\$ -	\$ -	\$ -	0.00%
Fees	\$ -	\$ -	\$ -	0.00%
TOTAL FUNDING	\$ 6,618,911.59	\$ 72,589.45	\$ 10,372,622	64.51%

As of 8/28/23

**Lakeshore Regional Entity
Substance Use Disorders
FY23 Healthy MI Plan Treatment Expenditures**

Year To Date Through 7/31/23

CATEGORY	CMHSP HMP YTD Totals	LRE Admin HMP YTD Totals	LRE HMP Budget Totals	LRE % of Budget Spent
Total Expenditures for Treatment Services				
	\$ 9,005,521.33	\$ -	\$ 18,194,448	49.50%
Women's Specialty Services	\$ 215,893.71	\$ -	\$ 567,561	38.04%
Other Specialty Services	\$ -	\$ -	\$ -	0.00%
Access Management System	\$ 401,896.03	\$ -	\$ 210,777	190.67%
General Administration	\$ 130,238.13	\$ 133,479.24	\$ 933,710	28.24%
GRAND TOTAL OF SA EXPENDITURES	\$ 9,753,549.20	\$ 133,479.24	\$ 19,906,496	49.67%
SOURCE OF FUNDS				
Healthy MI Plan	\$ 9,753,549.20	\$ 133,479.24	\$ 19,906,496	49.67%
Other: Local	\$ -	\$ -	\$ -	0.00%
Other: Federal	\$ -	\$ -	\$ -	0.00%
Fees	\$ -	\$ -	\$ -	0.00%
TOTAL FUNDING	\$ 9,753,549.20	\$ 133,479.24	\$ 19,906,496	49.67%

As of 8/28/23

Lakeshore Regional Entity
Oversight Policy Board

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ACTION REQUEST

SUBJECT: FY2023 LRE SUD Budget Amendment 2

- Approval of PA2 Funds
- Advice and Recommendation to LRE Board for Budgets Containing non-PA2 Funds

MEETING DATE: September 6, 2023

PREPARED BY: Stacia Chick, LRE Chief Financial Officer

RECOMMENDED MOTION:

The Oversight Policy Board:

- (a) **Approves the allocation of PA2 funds for the LRE SUD Budget as summarized below.**
 (b) **Advises and recommends that the LRE Board approve the non-PA2 fund budgets for SUD services as summarized below.**

PROPOSED TO GO TO THE BOARD ON SEPTEMBER 27, 2023

SUMMARY OF REQUEST/INFORMATION:

- Public Act 500 of 2012 requires each PIHP region to establish an Oversight Policy Board with certain roles and responsibilities relative to substance abuse services.
- The Lakeshore Regional Entity Oversight Policy Board is the Oversight Policy Board for Region 3 PIHP.
- Among other functions, the Oversight Policy Board is responsible to approve budgets which contain local funds and to advise and recommend budgets containing non-local funds to the LRE board for services within the region.

STAFF: Stacia Chick, LRE Chief Financial Officer

DATE: August 25, 2023

FY2023 LRE SUD Budget Amendment 2 Summary:

<u>PREVENTION (direct by LRE)</u>	<u>PA2</u>	<u>Block Grant</u>	<u>SOR</u>	<u>ARPA</u>	<u>COVID-19</u>	<u>Gambling</u>	<u>DFC</u>	<u>Medicaid</u>	<u>Healthy Michigan</u>	<u>Total</u>
<i>Allegan County</i>	\$ 90,039	\$ 214,011	\$ 39,000	\$ 16,666	\$ 86,802	\$ -	\$ -	\$ -		\$ 446,518
<i>Kent County</i>	\$ 699,091	\$ 271,909	\$ 65,000	\$ 47,264	\$ 391,176	\$ 29,000	\$ -	\$ -	\$ -	\$ 1,503,440
<i>Lake County</i>	\$ 3,533	\$ 12,175	\$ -	\$ -	\$ 14,690	\$ 9,666	\$ -	\$ -	\$ -	\$ 40,064
<i>Oceana County</i>	\$ 10,148	\$ 19,621	\$ -	\$ -	\$ 14,539	\$ 9,666	\$ -	\$ -	\$ -	\$ 53,974
<i>Mason County</i>	\$ 35,000	\$ 25,463	\$ 37,200	\$ 14,766	\$ 28,601	\$ 7,668	\$ 119,539	\$ -	\$ -	\$ 268,237
<i>Muskegon County</i>	\$ 64,793	\$ 342,364	\$ 20,000	\$ 18,336	\$ 138,851	\$ 29,000	\$ -	\$ -	\$ -	\$ 613,344
<i>Ottawa County</i>	\$ 354,585	\$ 133,340	\$ 53,000	\$ 49,528	\$ 160,495	\$ 25,400	\$ -	\$ -	\$ -	\$ 776,348
<i>LRE Regional Projects</i>	\$ -	\$ 82,500	\$ -	\$ 38,715	\$ 135,961	\$ 32,134	\$ -	\$ -	\$ -	\$ 289,310
<i>LRE Staffing</i>	\$ -	\$ 146,899	\$ 41,090	\$ -	\$ 67,539	\$ 15,401	\$ 25,663	\$ -	\$ -	\$ 296,592
<i>Unallocated</i>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PREVENTION TOTAL	\$ 1,257,189	\$ 1,248,282	\$ 255,290	\$ 185,275	\$ 1,038,654	\$ 157,935	\$ 145,202	\$ -	\$ -	\$ 4,287,827

<u>TREATMENT (delegated to CMH memb</u>	<u>PA2</u>	<u>Block Grant</u>	<u>SOR</u>	<u>ARPA</u>	<u>COVID-19</u>	<u>Gambling</u>	<u>DFC</u>	<u>Medicaid</u>	<u>Healthy Michigan</u>	<u>Total</u>
<i>Allegan</i>	\$ 101,887	\$ 436,821	\$ 278,375	\$ 75,000	\$ 171,963	\$ -	\$ -	\$ 811,059	\$ 1,466,147	\$ 3,341,252
<i>Healthwest</i>	\$ 355,144	\$ 941,977	\$ 964,454	\$ 25,000	\$ 256,015	\$ -	\$ -	\$ 2,122,156	\$ 3,978,120	\$ 8,642,866
<i>Network 180</i>	\$ 1,228,280	\$ 2,524,216	\$ 1,246,476	\$ 175,000	\$ 529,537	\$ -	\$ -	\$ 5,031,837	\$ 9,869,016	\$ 20,604,362
<i>Ottawa</i>	\$ 210,615	\$ 800,000	\$ 257,295	\$ 50,000	\$ 503,000	\$ -	\$ -	\$ 1,281,580	\$ 2,698,781	\$ 5,801,272
<i>West Michigan (Lake, Mason Oceana)</i>	\$ 96,016	\$ 359,359	\$ 198,900	\$ -	\$ 65,000	\$ -	\$ -	\$ 753,910	\$ 1,385,916	\$ 2,859,102
<i>LRE Staffing</i>	\$ -	\$ 250,732	\$ 161,409	\$ 7,500	\$ 27,500	\$ -	\$ -	\$ 359,377	\$ 696,988	\$ 1,503,506
TREATMENT TOTAL	\$ 1,991,942	\$ 5,313,105	\$ 3,106,909	\$ 332,500	\$ 1,553,015	\$ -	\$ -	\$ 10,359,919	\$ 20,094,969	\$ 42,752,359

TOTAL PREVENTION & TREATMENT	\$ 3,249,131	\$ 6,561,387	\$ 3,362,199	\$ 517,775	\$ 2,591,669	\$ 157,935	\$ 145,202	\$ 10,359,919	\$ 20,094,969	\$ 47,040,186
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Lakeshore Regional Entity FY 2023 SUD Budget

Prevention	Proposed FY23 Am 1	Proposed FY23 Am 2	Block Grants	SOR	Amer Rescue Plan Act	COVID-19	PA2	Gambling	DFC
Allegan County									
OnPoint (Allegan Co CMH)	446,518	446,518	214,011	39,000	16,666	86,802	90,039	-	-
Total	446,518	446,518	214,011	39,000	16,666	86,802	90,039	-	-
Kent County									
Arbor Circle	202,042	202,042	45,950	-	-	91,042	65,050	-	-
Family Outreach	184,214	182,214	27,467	-	13,930	76,284	35,533	29,000	-
Kent County Health Department	486,098	486,098	54,839	65,000	16,667	82,431	267,161	-	-
Network 180	433,431	433,431	79,687	-	-	83,431	270,313	-	-
Wedgwood	199,655	199,655	63,966	-	16,667	57,988	61,034	-	-
Total	1,505,440	1,503,440	271,909	65,000	47,264	391,176	699,091	29,000	-
Lake County									
District Health Department #10	41,064	40,064	12,175	-	-	14,690	3,533	9,666	-
Total	41,064	40,064	12,175	-	-	14,690	3,533	9,666	-
Oceana County									
District Health Department #10	54,974	53,974	19,621	-	-	14,539	10,148	9,666	-
Total	54,974	53,974	19,621	-	-	14,539	10,148	9,666	-
Mason County									
District Health Department #10	251,698	268,237	25,463	37,200	14,766	28,601	35,000	7,668	119,539
Total	251,698	268,237	25,463	37,200	14,766	28,601	35,000	7,668	119,539
Muskegon County									
Arbor Circle (Muskegon Co)	70,387	70,387	12,500	-	-	57,887	-	-	-
Public Health Muskegon County	437,839	435,839	294,025	20,000	9,168	42,671	40,975	29,000	-
Mercy Health	107,118	107,118	35,839	-	9,168	38,293	23,818	-	-
Total	615,344	613,344	342,364	20,000	18,336	138,851	64,793	29,000	-
Ottawa County									
Arbor Circle (Ottawa Co)	482,661	480,661	116,823	25,000	31,908	63,353	218,177	25,400	-
CMH of Ottawa County	121,079	121,079	-	-	8,810	51,269	61,000	-	-
Ottawa County Department of Public Health	174,608	174,608	16,517	28,000	8,810	45,873	75,408	-	-
Total	778,348	776,348	133,340	53,000	49,528	160,495	354,585	25,400	-
LRE Regional Projects (TalkSooner, Trainings, Conference, Tech. Assistance, Family Meals Month)									
	275,961	289,310	82,500	-	38,715	135,961	-	32,134	-
LRE Staffing	252,429	296,592	146,899	41,090	-	67,539	-	15,401	25,663
Unallocated	-	-	-	-	-	-	-	-	-
Total	528,390	585,902	229,399	41,090	38,715	203,500	-	47,535	25,663
Overall Prevention Total	4,221,776	4,287,827	1,248,282	255,290	185,275	1,038,654	1,257,189	157,935	145,202

Treatment	Proposed FY23 Am 1	Proposed FY23 Am 2	Block Grants (incl. SDA)	SOR	Amer Rescue Plan Act	COVID-19	PA2	Medicaid	Healthy Michigan
OnPoint (Allegan Co CMH)	3,250,724	3,341,252	436,821	278,375	75,000	171,963	101,887	811,059	1,466,147
Healthwest	8,599,155	8,642,866	941,977	964,454	25,000	256,015	355,144	2,122,156	3,978,120
Network 180	20,493,046	20,604,362	2,524,216	1,246,476	175,000	529,537	1,228,280	5,031,837	9,869,016
CMH of Ottawa County	5,998,374	5,801,272	800,000	257,295	50,000	503,000	210,615	1,281,580	2,698,781
West Michigan CMH (Lake, Mason Oceana)	2,854,849	2,859,102	359,359	198,900	-	65,000	96,016	753,910	1,385,916
LRE Staffing & Regional Projects	1,537,745	1,503,506	250,732	161,409	7,500	27,500	-	359,377	696,988
Overall Treatment Total	42,733,893	42,752,359	5,313,105	3,106,909	332,500	1,553,015	1,991,942	10,359,919	20,094,969

SUD Total Prevention + Treatment:	46,955,669	47,040,186	6,561,387	3,362,199	517,775	2,591,669	3,249,131	10,517,854	20,240,171
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Lakeshore Regional Entity Oversight Policy Board

ACTION REQUEST**SUBJECT: FY2024 LRE SUD Budget**

- Approval of PA2 Funds
- Advice and Recommendation to LRE Board for Budgets Containing non-PA2 Funds

MEETING DATE: September 6, 2023**PREPARED BY:** Stacia Chick, LRE Chief Financial Officer**RECOMMENDED MOTION:****The Oversight Policy Board:**

- (a) **Approves the allocation of PA2 funds for the LRE SUD Budget as summarized below.**
 (b) **Advises and recommends that the LRE Board approve the non-PA2 fund budgets for SUD services as summarized below.**

PROPOSED TO GO TO THE BOARD ON SEPTEMBER 27, 2023**SUMMARY OF REQUEST/INFORMATION:**

- Public Act 500 of 2012 requires each PIHP region to establish an Oversight Policy Board with certain roles and responsibilities relative to substance abuse services.
- The Lakeshore Regional Entity Oversight Policy Board is the Oversight Policy Board for Region 3 PIHP.
- Among other functions, the Oversight Policy Board is responsible to approve budgets which contain local funds and to advise and recommend budgets containing non-local funds to the LRE board for services within the region.

STAFF: Stacia Chick, LRE Chief Financial Officer**DATE:** August 30, 2023**FY2024 LRE SUD Budget Summary:**

<u>PREVENTION (direct by LRE)</u>	<u>PA2</u>	<u>Block Grant</u>	<u>SOR</u>	<u>ARPA</u>	<u>COVID-19</u>	<u>Gambling</u>	<u>DFC</u>	<u>Medicaid</u>	<u>Healthy Michigan</u>	<u>Total</u>
<i>Allegan County</i>	\$ 191,925	\$ 108,701	\$ 39,000	\$ 16,660	\$ 25,000	\$ -	\$ -	\$ -		\$ 381,286
<i>Kent County</i>	\$ 479,597	\$ 587,783	\$ 65,000	\$ 33,327	\$ 112,000	\$ -	\$ -	\$ -	\$ -	\$ 1,277,707
<i>Lake County</i>	\$ 4,340	\$ 11,225	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,565
<i>Oceana County</i>	\$ 27,058	\$ 25,852	\$ -	\$ -	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ 152,910
<i>Mason County</i>	\$ 29,304	\$ 27,998	\$ 37,200	\$ 14,766	\$ 15,000	\$ 32,000	\$ -	\$ -	\$ -	\$ 156,268
<i>Muskegon County</i>	\$ 239,424	\$ 167,732	\$ 20,034	\$ 18,338	\$ 45,000	\$ 43,000	\$ -	\$ -	\$ -	\$ 533,528
<i>Ottawa County</i>	\$ 354,585	\$ 257,388	\$ 53,000	\$ 49,528	\$ 20,000	\$ 28,000	\$ -	\$ -	\$ -	\$ 762,501
<i>LRE Regional Projects</i>	\$ -	\$ 70,000	\$ -	\$ 21,700	\$ 25,500	\$ 35,500	\$ -	\$ -	\$ -	\$ 152,700
<i>LRE Staffing</i>	\$ -	\$ 34,400	\$ 41,147	\$ 14,741	\$ 40,763	\$ 33,301	\$ 25,000	\$ -	\$ -	\$ 189,352
<i>Unallocated</i>	\$ -	\$ 155,001	\$ -	\$ -	\$ 21,138	\$ -	\$ -	\$ -	\$ -	\$ 176,139
PREVENTION TOTAL	\$ 1,326,233	\$ 1,446,080	\$ 255,381	\$ 169,060	\$ 304,401	\$ 171,801	\$ 125,000	\$ -	\$ -	\$ 3,797,956

<u>TREATMENT(delegated to CMH members)</u>	<u>PA2</u>	<u>Block Grant</u>	<u>SOR</u>	<u>ARPA</u>	<u>COVID-19</u>	<u>Gambling</u>	<u>DFC</u>	<u>Medicaid</u>	<u>Healthy Michigan</u>	<u>Total</u>
<i>Allegan</i>	\$ -	\$ 488,460	\$ 228,651	\$ -	\$ 171,963	\$ -	\$ -	\$ 740,224	\$ 1,287,401	\$ 2,916,699
<i>Healthwest</i>	\$ 180,511	\$ 751,523	\$ 1,022,005	\$ 50,000	\$ 6,487	\$ -	\$ -	\$ 1,938,957	\$ 3,485,931	\$ 7,435,414
<i>Network 180</i>	\$ 1,447,774	\$ 2,497,540	\$ 1,139,341	\$ 175,000	\$ 229,006	\$ -	\$ -	\$ 4,596,526	\$ 8,661,120	\$ 18,746,307
<i>Ottawa</i>	\$ 267,723	\$ 824,524	\$ 167,742	\$ 150,000	\$ 220,000	\$ -	\$ -	\$ 1,185,378	\$ 2,378,104	\$ 5,193,471
<i>West Michigan (Lake, Mason Oceana)</i>	\$ 20,000	\$ 411,819	\$ 185,068	\$ -	\$ 65,000	\$ -	\$ -	\$ 694,385	\$ 1,214,006	\$ 2,590,278
<i>LRE Staffing & Regional Projects</i>	\$ -	\$ 311,418	\$ 281,364	\$ 10,100	\$ 45,513	\$ -	\$ -	\$ 350,386	\$ 649,669	\$ 1,648,450
<i>Unallocated</i>	\$ 506,125	\$ 277,306	\$ 172,006	\$ 114,900	\$ 438,536	\$ -	\$ -	\$ -	\$ -	\$ 1,508,873
TREATMENT TOTAL	\$ 2,422,133	\$ 5,562,590	\$ 3,196,177	\$ 500,000	\$ 1,176,505	\$ -	\$ -	\$ 9,505,856	\$ 17,676,231	\$ 40,039,492

TOTAL PREVENTION & TREATMENT	\$ 3,748,366	\$ 7,008,670	\$ 3,451,558	\$ 669,060	\$ 1,480,906	\$ 171,801	\$ 125,000	\$ 9,505,856	\$ 17,676,231	\$ 43,837,448
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Lakeshore Regional Entity FY 2024 SUD Budget

Prevention	Initial FY23 Allocation	Proposed FY24 Allocation	Block Grants	SOR	Amer Rescue Plan Act	COVID-19	PA2	Gambling	DFC
Allegan County									
OnPoint (Allegan Co CMH)	396,085	381,286	108,701	39,000	16,660	25,000	191,925	-	-
Total	396,085	381,286	108,701	39,000	16,660	25,000	191,925	-	-
Kent County									
Arbor Circle	151,410	166,607	100,010	-	-	32,000	34,597	-	-
Family Outreach	161,073	-	-	-	-	-	-	-	-
Kent County Health Department	403,667	534,440	242,773	65,000	16,667	30,000	180,000	-	-
Network 180	382,434	400,000	175,000	-	-	25,000	200,000	-	-
Wedgwood	182,077	176,660	70,000	-	16,660	25,000	65,000	-	-
Total	1,280,661	1,277,707	587,783	65,000	33,327	112,000	479,597	-	-
Lake County									
District Health Department #10	26,374	15,565	11,225	-	-	-	4,340	-	-
Total	26,374	15,565	11,225	-	-	-	4,340	-	-
Oceana County									
District Health Department #10	40,435	152,910	25,852	-	-	-	27,058	-	100,000
Total	40,435	152,910	25,852	-	-	-	27,058	-	100,000
Mason County									
District Health Department #10	223,097	156,268	27,998	37,200	14,766	15,000	29,304	32,000	-
Total	223,097	156,268	27,998	37,200	14,766	15,000	29,304	32,000	-
Muskegon County									
Arbor Circle (Muskegon Co)	36,596	-	-	-	-	-	-	-	-
Public Health Muskegon County	395,168	439,358	127,732	20,034	9,168	30,000	209,424	43,000	-
Mercy Health	92,921	94,170	40,000	-	9,170	15,000	30,000	-	-
Total	524,685	533,528	167,732	20,034	18,338	45,000	239,424	43,000	-
Ottawa County									
Arbor Circle (Ottawa Co)	442,220	457,296	172,388	25,000	31,908	-	200,000	28,000	-
CMH of Ottawa County	92,722	101,573	-	-	8,810	10,000	82,763	-	-
Ottawa County Department of Public Health	128,735	203,632	85,000	28,000	8,810	10,000	71,822	-	-
Total	663,677	762,501	257,388	53,000	49,528	20,000	354,585	28,000	-
LRE Regional Projects (TalkSooner, Trainings, Conference, Tech. Assistance, Family Meals Month)									
	188,000	152,700	70,000	-	21,700	25,500	-	35,500	-
LRE Staffing									
Unallocated	248,589	189,352	34,400	41,147	14,741	40,763	-	33,301	25,000
Total	104,372	176,139	155,001	-	-	21,138	-	-	-
Total	540,961	518,191	259,401	41,147	36,441	87,401	-	68,801	25,000
Overall Prevention Total	3,695,975	3,797,956	1,446,080	255,381	169,060	304,401	1,326,233	171,801	125,000

Treatment	Initial FY23 Allocation	Proposed FY24 Allocation	Block Grants (incl. SDA)	SOR	Amer Rescue Plan Act	COVID-19	PA2	Medicaid	Healthy Michigan
OnPoint (Allegan Co CMH)	2,465,964	2,916,699	488,460	228,651	-	171,963	-	740,224	1,287,401
Healthwest	6,422,216	7,435,414	751,523	1,022,005	50,000	6,487	180,511	1,938,957	3,485,931
Network 180	15,565,627	18,746,307	2,497,540	1,139,341	175,000	229,006	1,447,774	4,596,526	8,661,120
CMH of Ottawa County	4,042,258	5,193,471	824,524	167,742	150,000	220,000	267,723	1,185,378	2,378,104
West Michigan CMH (Lake, Mason Oceana)	2,190,529	2,590,278	411,819	185,068	-	65,000	20,000	694,385	1,214,006
LRE Staffing & Regional Projects	665,763	1,648,450	311,418	281,364	10,100	45,513	-	350,386	649,669
Unallocated	-	1,508,873	277,306	172,006	114,900	438,536	506,125	-	-
Overall Treatment Total	31,352,356	40,039,492	5,562,590	3,196,177	500,000	1,176,505	2,422,133	9,505,856	17,676,231

SUD Total Prevention + Treatment:	35,048,331	43,837,448	7,008,670	3,451,558	669,060	1,480,906	3,748,366	9,677,657	17,801,231
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Policy 12.4

POLICY TITLE:	USE OF RESERVE PA2 FUNDS	POLICY #12.4		
Topic Area:	SUBSTANCE USE DISORDER PREVENTION AND TREATMENT	ISSUED BY: Chief Executive Officer APPROVED BY: Board of Directors	REVIEW DATES	
Applies to:	SUD providers, CMHSP Members, and Oversight Policy Board Members		12/16/21	
Developed and Maintained by:	CEO and Designee			
Supersedes:	N/A			
		Effective Date: 4/19/2018	Revised Date: <u>12/16/2021</u> / <u>7/21/2023</u>	

I. PURPOSE

Per Public Act 206 of 1893, Section 24e, Paragraph 11, as amended, the Entity Lakeshore Regional Entity (LRE) receives liquor tax funds, also known as PA2 funds, from each of the counties in the region. The funds are for local use in treatment, intervention, and prevention of SUD services. This policy stipulates the authority for and the approved use of PA2 funds.

II. POLICY

Pursuant to and in accordance with MCL 211.24e, the Lakeshore Regional Entity (Entity) LRE shall receive, administer, and use PA2 funds in accordance with the law and at the direction of the Substance Use Disorder (SUD) Oversight Policy Advisory Board (OPB).

A. PA2 funds shall be accounted for by county of origin and shall be used exclusively in the county from which they were derived. PA2 fund balances must be accounted for by each county and planned use must occur in the county of origin. Interest income from PA2 funds is considered local income and, at the direction of the SUD OPB, must be used to support SUD treatment and recovery, intervention and prevention activities or the related proportionate share of administrative costs.

~~B. In accordance with MCL 211.24e: (11) If the sum of a county's operating property tax levy for the ensuing fiscal year plus the county's distribution to be received pursuant to section 10 of the state convention facility development act, 1985 PA 106, MCL 207.630; Section 10.3, exceeds the product of the county's taxable value for the ensuing fiscal year times the greater of the county's base tax rate or concluding fiscal year's operating millage rate, then an amount equal to the lesser of 50% of the excess or 50% of the state convention facility development act distribution shall be used for substance abuse treatment programs within the county. The proceeds received by the taxing unit shall be distributed to the coordinating agency designated for that county pursuant to section 6226 of the public health code, 1978 PA 368, MCL 333.6226, and used only for substance abuse prevention and treatment programs in the county from which the proceeds originated.~~

a distribution to a county pursuant to this section shall be included for purposes of the calculations required to be made by section 24e of the general property tax act, 1893 PA 206, MCL 211.24e. If the governing body of a taxing unit approves the additional millage rate under section 24e of the general property tax act, 1893 PA 206, MCL 211.24e, that is due to distributions pursuant to this section, then an amount not less than either of the following must be used for substance abuse treatment within the taxing unit:

(a) 40% of the distribution under this section.

(b) The amount used for substance abuse treatment within the taxing unit in the fiscal year ending September 30, 2022.

E.B. At least annually, the SUD OPB shall approve a plan and budget developed by LRE Finance Staff by July 1 to determine the amount of reserve PA2 Liquor Tax funds that will be made available for the coming-next Fiscal Year starting October 1. The plan and budget shall include the amount of planned funding to be expended; the intended purpose for SUD treatment and recovery, intervention, or prevention; and the identified primary contractor(s).

D.C. The Entity Finance Team shall prepare and provide the SUD OPB with a bi-monthly ~~quarterly~~ reports of PA2 funds received and disbursed.

E.D. PA2 Funds will not be used to cover administrative costs.

III. APPLICABILITY AND RESPONSIBILITY

This policy applies to Prevention Providers who contract directly with Entity, CMHSPs and contracted Providers who offer SUD Treatment and Recovery.

IV. MONITORING AND REVIEW

This policy will be reviewed annually by the CEO-COO and designee with input from the SUD ROAT and OPB members.

V. DEFINITIONS

PA2: Public Act 2 Liquor Tax Funds

OPB: Oversight Policy Advisory Board

SUD: Substance Use Disorder

VI. RELATED POLICIES AND PROCEDURES

A. 12.4a Use of PA2 Funds for Special Projects ~~Procedure~~

VII. REFERENCES/LEGAL AUTHORITY

A. Public Act 206 of 1893, Section 24e, Paragraph 11, as amended; MCL 211.24e

B. MDHHS Medicaid Specialty Supports and Services Contract

VIII. CHANGE LOG

Date of Change	Description of Change	Responsible Party
4/19/2018	New Procedure	LRE SUD Director
12/16/2021	Updated language, separated policy/procedure	CEO and Designee

<u>7/21/2023</u>	<u>Updated language</u>	<u>Chief Operating Officer</u>

ORGANIZATIONAL PROCEDURE

5 HH57 < A9BH+

PROCEDURE # <u>12.4a</u>	EFFECTIVE DATE	REVISED DATE
TITLE: <u>USE OF RESERVE PA2 FUNDS FOR SPECIAL PROJECTS</u>	<u>4/19/2018</u>	<u>7/21/2023</u>
ATTACHMENT TO	REVIEW DATES	
POLICY #: <u>12.4</u>	<u>12/16/2021, 7/21/2023</u>	
POLICY TITLE: <u>PA2 RESERVE FUNDS DISTRIBUTION</u>		
CHAPTER: <u>SUBSTANCE USE DISORDERS</u>		

I. PURPOSE

To provide LRE contract SUD Treatment and Prevention Providers an opportunity to access reserve PA2 funds for the development of new and innovative programs for which other funding is unavailable.

All reserve PA2 funds requested must be used within the fiscal year in which they are granted. There will be no guarantee that funding will be available in subsequent years. The Lakeshore Regional Entity (Entity) will maintain an established procedure for Substance Use Disorder (SUD) Providers to request reserve PA2 funds.

II. PROCEDURES

- A. Licensed Any contracted SUD Treatment or Prevention providers who wish requesting to request reserve PA2 funds for SUD Treatment or Prevention programs will be required to submit a letter of interest to the Entity SUD Director Chief Operating Officer detailing their project request.
 1. For Prevention Services:
 - a. The Entity LRE SUD Director Chief Operating Officer will review the request and determine if the specific county has an identified need for the project and if the project has merit.
 - b. If there is an identified need and the project is found to have merit, the interested party must submit the "Special Project Application Form for PA2 Funds" to the Entity.
 - c. Priority will be given to projects that meet an identified community need and utilize evidence-based practices.
 2. For SUD Treatment:
 - a. The Entity SUD Director LRE Chief Operating Officer will consult with the appropriate CMHSP SUD Coordinator to determine if the project has merit and meets an identified need in the county.
 - b. If both parties agree the project meets an identified need and has merit, the LRE Chief Operating Officer Entity SUD Director will instruct the interested party to submit the "Special Project Application Form for PA2 Funds".
 - c. Priority will be given to projects that meet an identified community need and utilize evidence-based practices.

3. Completed Special Project for PA2 Funds application(s) will be reviewed at the next regularly scheduled SUD Regional Operations Advisory Team (ROAT) meeting for recommendations.
4. ~~LRE Chief Operating Officer~~~~The Entity SUD Director~~ will present the application(s) and any recommendations to the Oversight Policy Board (OPB) at their next regularly scheduled meeting.
 - a. For Prevention applications: Upon approval by the OPB members, the ~~LRE Chief Operating Officer~~~~Entity SUD Director~~, in conjunction with the Finance team, will issue contracts for prevention services.
 - b. For SUD Treatment and Recovery: A contract will be coordinated with the CMSHP's for fund distribution directly to the agencies.
5. PA2 funds that are distributed through the Special Project Application process will be available only for the fiscal year in which they are distributed.
 - a. Providers will be required to submit the Special Project Application Form for PA2 funds annually should they wish to continue the project in subsequent fiscal years.

III. APPLICABILITY AND RESPONSIBILITY

This procedure applies to SUD Prevention Providers ~~contracting that contract~~ directly with the ~~Entity LRE, and as well as member~~ CMHSPs and SUD Treatment Providers who offer SUD Treatment and Recovery services.

IV. MONITORING AND REVIEW

This procedure will be reviewed annually by the ~~LRE Chief Operating Officer~~~~Entity SUD Director~~ with input from the SUD ROAT and OPB members.

V. DEFINITIONS

- PA2:** Public Act 2 Liquor Tax Funds
- OPB:** Oversight Policy Advisory Board
- SUD:** Substance Use Disorder

VI. RELATED POLICIES AND PROCEDURES

- A. ~~Liquor Tax Funds Policy 12.4~~LRE Policy 12.4 PA2 Reserve Funds Distribution
- B. Special Project Application ~~Form~~ for PA2 Funds Form

VII. REFERENCES/LEGAL AUTHORITY

- A. Public Act 206 of 1893, Section 24e, Paragraph 11, as amended; MCL 211.24e
- B. MDHHS Medicaid Specialty Supports and Services Contract

VIII. CHANGE LOG

Date of Change	Description of Change	Responsible Party
4/19/2018	New Procedure	SUD Director

12/16/2021	Annual Review	SUD Director
<u>7/21/2023</u>	<u>Annual Review – updated language</u>	<u>LRE Chief Operating Officer</u>

ORGANIZATIONAL PROCEDURE

5 HH57 < A9BH,

PROCEDURE # 12.4b	EFFECTIVE DATE	REVISED DATE
TITLE: REQUESTING ADDITIONAL PA2 FUNDS		
ATTACHMENT TO	REVIEW DATES	
POLICY #: 12.4		
POLICY TITLE: USE OF RESERVE PA2 FUNDS		
CHAPTER: SUBSTANCE USE DISORDER PREVENTION AND TREATMENT		

I. PURPOSE

To provide a process by which Substance Use Disorder (SUD) Treatment and/or Prevention Services Providers can access reserve PA2 funds within a Fiscal Year. This procedure applies to all contracted providers in the Lakeshore Region (Region 3 PIHP) who hold contracts for PA2 funds.

II. PROCEDURES

- A. It is recommended that any requests for additional funds be made no later than the end of the second quarter (March 31) of the current fiscal year to allow the Oversight Policy Board ample time to consider the request. Additional PA2 funds requests must be submitted no later than May 15 of the current fiscal year.
- B. All requests for additional funds must be made within the current fiscal year and must be applied to the same fiscal year. Requests for additional funds outside of the current fiscal year will not be considered.
- C. The total amount of requested additional funds cannot exceed the contracted provider's total PA2 budget for the fiscal year in which the additional funds are being requested.
- D. When a contracted SUD Treatment or Prevention provider wants to request additional PA2 funding, a formal request must be made in writing to the LRE Oversight Policy Board through the LRE Chief Operating Officer. The request must include the following:
 1. The total amount of additional PA2 funds being requested.
 2. A justification for why the additional funds are needed.
 3. A description of the programs/services and applicable service codes for which the funds are intended.
 4. How funds will be applied.
 5. A complete budget and budget narrative.
 6. A sustainability plan
 7. A list of other sources of funding (Block Grant, Specialty Grant, Medicaid, other) that have been considered and why these sources were not used.
- E. For Prevention Services, LRE Chief Operating Officer, in conjunction with the LRE Finance Team, will review the request and determine whether other funding sources are available and can meet the needs of the program requesting additional funds.

- F. For SUD Treatment, LRE Chief Operating Officer will consult with the appropriate CMHSP SUD Coordinator to review the request and determine whether other funding sources are available to meet the needs of the program requesting additional funds.
- G. LRE Chief Operating Officer will work with LRE Finance Team to develop a proposed budget adjustment to be presented to the LRE Oversight Policy Board during the next regularly scheduled meeting. The Oversight Policy Board, with support from LRE COO, Prevention Services Manager and SUD Treatment Manger will:
 - 1. Invite the requesting agency to the next regularly scheduled OPB meeting to provide an informational presentation focusing on programs and services to be impacted by the additional funds requested.
 - a. Presentation to include plans for future sustainability without additional PA2 funds
 - 2. Review the funding request and supporting documentation to ensure that all required components are present.
 - 3. Review current PA2 Financial status reports to ensure that requested funds are available for the specific county requesting additional funds.
- H. If the request is approved by the Oversight Policy Board, contract amendments will be issued to the provider noting the changes in funding.
- I. If the request is denied by the Oversight Policy Board, the requesting organization will be notified within 5 business days of the determination.

III. CHANGE LOG

Date of Change	Description of Change	Responsible Party
8/1/2023	NEW PROCEDURE	LRE COO

SPECIAL PROJECT APPLICATION FOR PA2 FUNDS

DATE: 8/21/2023

 PROVIDER NAME: CMHOC CURRENT PROVIDER: _____ YES NO

 PROGRAM TITLE: **Recovery Coach Supportive Services – Homeless Outreach**

CONTACT PERSON: Joel Ebbers

CONTACT EMAIL: Jebbers@miottawa.org

PROVIDER ADDRESS: 12265 James Street, Holland MI, 49424

SERVICE TYPE

- | | |
|---|--|
| <input type="radio"/> Assessment
<input type="radio"/> Individual Therapy
<input type="radio"/> Group Therapy
<input type="radio"/> Family Therapy
<input type="radio"/> Didactic Groups
<input type="radio"/> Residential Detox
<input type="radio"/> Recovery Housing | <input type="radio"/> Level III.1 (low intensity)
<input type="radio"/> Level III.3 (moderate to high intensity)
<input type="radio"/> Level III.5 (significant/complex intensity)
<input type="radio"/> Medication Assisted Treatment
<input checked="" type="radio"/> Peer Recovery
<input type="radio"/> Prevention/Other: Click here to enter text. |
|---|--|

PROGRAM DESCRIPTION

I. Describe the situation you intend to address:	
<i>Problem Statement: describe the problem that your activities are designed to improve.</i>	To improve consumer’s health and wellness and enhance current care coordination efforts for individuals seeking and engaged in recovery supports.
<i>Describe the conditions that contribute to the identified problem (List the data sources if applicable)</i>	CMHOC has identified a need in improving care coordination efforts with organizations in the community who provide services to mutual consumers.
<i>Describe the program’s target population. Be sure to identify if you are targeting any specialty or priority population.</i>	Individuals with a substance use disorder or cooccurring disorder who are engaged with and seeking additional recovery supports. Many of these individuals are experiencing homelessness, which is often exacerbated by and underlying substance abuse disorder (SUD) and/or mental illness. Currently, there are nearly 250 individuals in the Holland area that are meet the Category 1 criteria

	of literally homeless. The funds will be used to assist individuals within this population to seek treatment and recovery supports.
<i>Describe why your agency is best fit to provide this service?</i>	CMHOC coordinates services for Ottawa County and is uniquely positioned to be able to provide wrap around services through multiple stages of the treatment and recovery process. The partnership with CAH helps to remove transportation barriers by allowing the recovery coach to meet individuals at various service locations and other sites throughout the County. The coach is also able to build off of relationships already established by the CAH Outreach Team, contributing to quicker treatment due to already established trust.

II. Describe what you will do to address the situation:

<i>Describe the program's activities (what are you going to do?):</i>	The primary objective is to help individuals identify their recovery goals and barriers that may hinder the recovery process. The recovery coach will assist connecting the individual with appropriate resources and support systems. The recovery coach will provide ongoing support tailored to the individual's needs.
<i>Describe the expected frequency of the activity(ies) and how you determined this.</i>	The recovery coach is available daily and will meet with individuals based on their unique needs, goals, etc. Activities will be coordinated with the schedule of various service sites and meeting times throughout the week. One of the goals is to meet individuals where they are at so frequency will be also be driven by the individual's needs.
<i>Describe the number of persons in the target population you expect to serve during each activity event</i>	The Recovery Coach is assisting approximately 30-40 individuals on their caseload. These individuals are receiving SUD services through CMHOC or other contracted agencies.

III. Explain the necessary costs for your program (provide narrative to support the resources identified that require money).

Costs are related to the staff cost of the recovery coach position. Salary, fringe, and direct costs for providing recovery coach services.

IV. Describe the goals you have established for the program. (do not have to be measurable) (TO BE COMPLETED BY NEW PROGRAMS ONLY)

Click or tap here to enter text.

1. Increase coordination as individuals transition levels of care within the substance abuse treatment

2. Decrease barriers in accessing recovery support services

3. Increase outreach to individuals who experience a lapse in their recovery

4. Click or tap here to enter text.

PERFORMANCE MONITORING
 (TO BE COMPLETED BY NEW PROGRAMS ONLY)

V. Describe how you will measure your program’s success at meeting its goals. *(Please identify only those measures that make sense for your proposed program. Not all measurement categories identified below must be measured.)*

Outcomes	<p>Process: <i>Describe (in specifically measurable terms) what you hope to achieve during this grant period. These process indicators should measure such things as “how many?” “how often?” etc. Include benchmark or threshold for measurement as well as expected achievement date.</i></p>	1. Recovery coach will maintain a caseload of 30 to 40 individuals.
		2. Recovery coach will maintain at least monthly contact with individuals on caseload. If an individual has not been in touch with the recovery coach, every effort will be made to check-in every two weeks. Much of the initial work will be to build relationships with individuals in need of and seeking treatment.
		3. Recovery goals will be established for each participant based on their unique needs. However, the ultimate goal is to connect individuals with the necessary resources to begin and sustain their recovery journey.
	<p>Participant: <i>Describe (in specifically measurable terms) what outcomes participants in your program can reasonably expect to achieve as a result. Include benchmark or threshold for measurement as well as expected achievement date.</i></p>	1. Each participant will establish goals for work with the recovery coach. All meetings and interactions will be documented in case management software with metrics provided on a monthly or quarterly basis.
		2. Participants will have increased opportunity for support group participation and recovery oriented social gatherings. In order to increase and support the recovery network, the recovery coach is developing a support group for other recovery coaches.
		3. Participants will be given the opportunity to address co-occurring concerns with the recovery coach. This includes mental health and physical health concerns.
	<p>Impact: <i>Describe the impact you expect the program will have upon your community, target population, and/or intervention practices. Impact measurement is different from outcome measurement in that it is not consumer specific.</i></p>	1. Identify individuals in need of recovery and provide additional capacity in order to increase the number of individuals who successfully move through levels of care within the substance abuse treatment array
		2. Build off of and increase the number of individuals who address their co-occurring concerns while in treatment. For the most recent reported time period, 11 individuals have entered treatment and 4 are in the process of being connected to resources for treatment.
		3. Increase the number of individuals who access recovery

		support services including housing and transportation supports.
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July 24, 2023

LRE Oversight Policy Board Patrick Sweeney, Oversight Policy Board Chair
Lakeshore Regional Entity
5000 Hakes Dr. 250
Norton Shores, MI 49441

Network180 is requesting the use of unused PA2 dollars to pay for Kent County Substance Use Disorder treatment programs. Network180 is requesting \$1.4 million for FY2023 and \$2 million for FY 2024 to pay for the community outreach programs Recovery Management and Family Engagement. Currently, Network180 has significant funding constraints for Medicaid and Health Michigan. Kent County has decided that it will use PA2 dollars, allocated to Kent County, to pay for the above programs in lieu of program cuts. Network180 is attempting to maximize all funding sources to address significant revenue issues that Network180 and the LRE region are currently experiencing.

Program information

Program Descriptions:

Recovery Management provides community based services to individuals who have complex and often co-occurring substance use and mental health needs. This service is focused on consumer engagement and motivation and assisting consumers to navigate the treatment system and move toward recovery. Network180 self runs one team and contracts with Arbor Circle, Family Outreach, Pine Rest, and Cherry Health to provide 6 teams in total. Teams are comprised of an MSW Clinician and a Peer Recovery Coach.

Family Engagement Program provides community based comprehensive, family-focused, clinical services and case management in the home and other community-based settings for adults (usually women) with school-aged children. The program intent is to provide substance use disorder treatment to the mother with the goal of keeping the family together. FET is designed to address the practical issues of child care, transportation, relationships, housing and/or other situations that can otherwise lead to insurmountable treatment barriers and pose risks to a client's ability to parent his/her children. Network180 currently contracts with Arbor Circle, Cherry Health, and the Family Outreach Center for a total of five teams. A Family Engagement team consists of a MSW Clinician, a Case Manager, and a Peer Recovery Coach.

These programs, over the years, have provided valuable care to Kent County residents and have kept families together and provided care for complex individuals that other treatment programs refused to serve.

If you have any questions please contact me at william.ward@network180.org

Sincerely,



William J. Ward
Executive Director Network180

August 1, 2023

William Ward, Executive Director
Network180
790 Fuller Avenue
Grand Rapids, MI 49503

Mr. Ward,

Lakeshore Regional Entity is in receipt of N180's request for unused PA2 Funds for FY2023 and FY2024. We are carefully considering this request and will endeavor to complete our review prior to presenting a recommendation to the Oversight Policy Board during the September 6, 2023 meeting.

The rationale for this request and the programs seem sound. However, the programs for which the PA2 funds are intended might possibly be funded through other sources such as specialty grants. There may be unused funds in the region from other sources that could be applied to these programs prior to accessing unused PA2 funds.

We respectfully request the following information be supplied in writing for both FY23 and FY24:

1. A complete budget and budget narrative for each FY.
2. A justification for why the additional funds are needed for each FY.
3. A description of the programs/services and applicable service codes for which the funds are intended.
4. A sustainability plan to ensure programs for which these funds are intended will continue beyond the end of FY2023.
5. A list of other sources of funding (Block Grant, Specialty Grant, Medicaid, other) that have been considered and why these sources were not used.

We look forward to your response.

Sincerely,



Mary Marlatt Dumas
Chief Executive Officer



Stephanie VanDerKooi
Chief Operating Officer

cc: Patrick Sweeney, LRE OPB Chair

August 14, 2023
 Mary Marlatt-Dumas
 Lakeshore Regional Entity (LRE)
 5000 Hakes Dr. 250
 Norton Shores, MI 49441

RE: Revenue Increase for Fiscal Year (FY) 2023 & 2024

Dear Ms. Marlatt-Dumas

Last month Network180 requested the Substance Use Disorder (SUD) Oversight Board and the LRE release \$1.4 million for FY 2023 and \$2.0 million for FY 2024 of Kent County’s PA 2 Funds. These funds will be used to offset an approximate \$2.0 million dollar shortfall for FY 23 & FY 24. These funds can pay for the programs Recovery Management and Family Engagement which will in turn eliminate the need for Medicaid Funds for these programs in FY 23 and FY 24. In response the LRE had additional questions which are answered as follows:

Network180 Response to LRE Regrading PA2 Request both FY23 and FY24

1. Program Budgets for FY23 and FY24

See also budget attachment

Annualized FY23	Suggested FY23 Budget	Suggested FY24 Budget	2 Fiscal Years
Provider - Site	Net FY23 Medicaid & HMP Impact	Contract Max	PA2 Request Total
Arbor Circle	306,860	470,548	777,408
ARB FEP CM Monthly-0410249	216,914	349,098	566,012
ARB RM Brief Intervention Monthly-0410249	89,946	121,450	211,396
Cherry Health	470,852	558,548	1,029,400
FEP and Methadone Counseling Monthly-Southside-0410015	174,413	321,509	495,922
RM Brief Intervention Monthly-Southside-0410015	296,439	237,039	533,478
Family Outreach Center	411,321	479,639	890,959
FEP Therapy Monthly-0410077	232,495	358,188	590,683
RM Brief Intervention Monthly-0410077	178,825	121,450	300,276
Pine Rest Substance Abuse Services	310,174	321,509	631,683
NOVA RM	310,174	321,509	631,683
Pine Rest SAS RM Team 2	-	-	-
Network180 Recovery Management Team	233,466	233,466	466,931
Grand Total	1,732,673	2,063,710	3,796,383
By Site Type			
Nova Program	Net Medicaid & HMP Impact	Contract Max	PA2 Request Total
Family Engagement	623,823	1,028,795	1,652,618
Recovery Management	1,108,850	1,034,915	2,143,765
Grand Total	1,732,673	2,063,710	3,796,383

2. Justification for why the additional funds are needed for each FY

Currently, Network180 has a revenue issue with Medicaid and Health Michigan. Network180 is projected to have a \$2,000,000 overspent in FY 23. In order to maximize all funding sources and to allow all programs to continue to serve Kent County consumers with no budget cuts, Network180 is requesting PA2 funding for both the Family Engagement Program and the Recovery Management program. Currently, Medicaid and Healthy Michigan funding sources have been fully utilized by Network180. PA2 dollars have not been fully maximized and we are requesting PA2 dollars to fund both of these SUD programs that are eligible SUD expenses. For FY24, Network180 anticipates that the

workforce issues that our county and state are encountering will slightly improve. This will mean providers will be able to hire additional staff, will serve more consumers and the financial demands of the Network180 provider network will increase. The additional service demands on Network180 will require that we continue to fund both the Recovery Management and Family Engagement Program with PA2 funds for the entirety of FY24.

If the LRE can identify and allocate alternative funding such as specialty grants or other unused funds from within the region, Network180 would welcome this collaboration. Network180 would of course use these alternative funding sources instead of PA2 dollars.

3. Program Service Description with applicable service codes

Recovery Management:

Codes -90846, 90847, H0001, H0002, H0004, H0038, H0050, T1012

The Recovery Management program provides community based services to individuals who have complex and often co-occurring substance use and mental health needs. This service is focused on consumer engagement and motivation and assisting consumers to navigate the treatment system and move toward recovery. Network180 self runs one team and contracts with Arbor Circle, Family Outreach, Pine Rest, and Cherry Health to provide 6 teams in total. Teams are comprised of an MSW Clinician and a Peer Recovery Coach. Often, the recovery management program is recommended for individuals who have accessed many SUD programs but are unable to obtain sustained recovery.

Family Engagement:

Codes – 90846, 90847, 90853, H0001, H0002, H0004, H0006, H0038, T1012

The Family Engagement program provides community based comprehensive, family-focused, clinical services and case management in the home and other community-based settings for adults (usually women) with school-aged children. The program intent is to provide substance use disorder treatment to the mother with the goal of keeping the family together. Services provided are provided in the home of the individual being treated. FET is designed to address the practical issues of child care, transportation, relationships, housing and/or other situations that can otherwise lead to insurmountable treatment barriers and pose risks to a client's ability to parent his/her children. Network180 currently contracts with Arbor Circle, Cherry Health, and the Family Outreach Center for a total of five teams. A Family Engagement team consists of a MSW Clinician, a Case Manager, and a Peer Recovery Coach.

4. Sustainability plan to ensure programs for which these funds are intended will continue beyond the end of FY2023

Network180 is working to ensure that we can sustain and continue these services as well as our entire network of services on going. We are using two years of PA2 funding for these programs because we believe that Medicaid rates will stabilize in FY25 and we can then utilize Medicaid and Health Michigan funding for these programs in FY25. Network180's intent is not to close these two programs, but rather us PA2 funds to allow us to better maximize the use of PA2 funds and allow all other services to continue unimpeded by funding cuts. There is no intention of cutting either of these programs in FY24 or 25.

5. A list of other sources of funding (Block Grant, Specialty Grant, Medicaid, other) that have been considered and why these sources were not used

Network180 currently uses all eligible funding sources for both programs. Most individuals in the programs have either Medicaid or Health Michigan but there are also individuals with no insurance who are eligible for SUD Federal Block Grant dollars. Network180 does utilize MDHHS child welfare funds for some of the Family Engagement Program services but only for eligible category I or II families. The 61st

District Drug Court also provides limited funding for the Family Engagement Program. If there are left over SOR grant dollars or other specialty SUD grant dollars that the LRE would be able to reallocate to either of these two programs, Network180 would welcome partnering on this with the LRE. Hopefully this answers all the LRE's questions so the request maybe forwarded to the SUD Oversight Board.

Sincerely,

A handwritten signature in black ink, appearing to read 'WJW', with a long horizontal flourish extending to the right.

William J. Ward
Executive Director

2023 Tobacco Sales Compliance Check Results



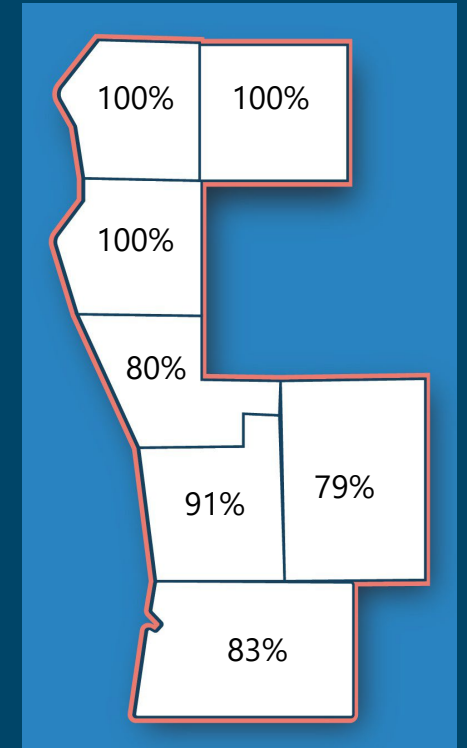
Compliance rate = the percentage of retailers that did not sell a tobacco product to a decoy under the age of 21.

LRE sample selected by MDHHS = 51,
Inspected = 49 (2 do not sell tobacco)

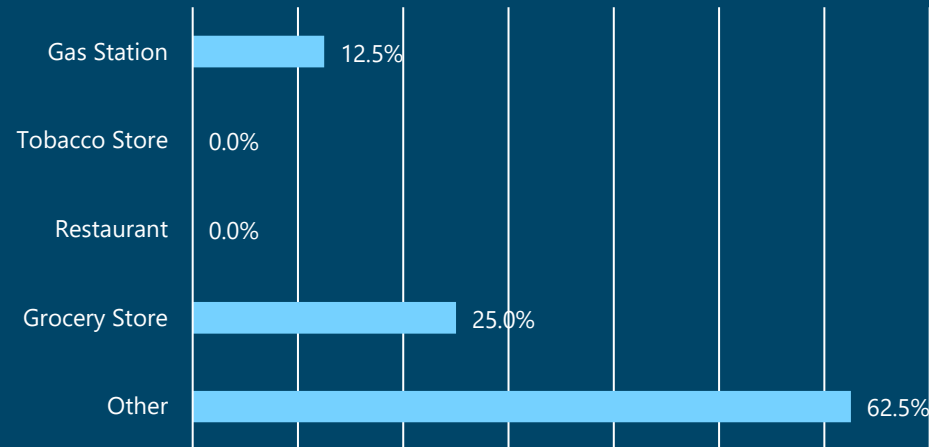


ATTACHMENT 11

Compliance Rates by County



Violation Rate by Vendor Type



KNOW THE FACTS

The Toll of Tobacco in Michigan

Data and source information can be found at tobacco-freekids.org



YOUTH TRENDS

3,200



The number of youth (under 18) who become new daily smokers each year.

AMONG MICHIGAN HIGH SCHOOL STUDENTS...

4.5

The percent who smoke, compared to 4.6 percent nationally.

20.8

The percent who use e-cigarettes, compared to 11.3 percent nationally.

HEALTH IMPACT

32.3

The percent of cancer deaths in Michigan attributed to smoking.

16,200



The number of Michigan adults who die each year from smoking.

Smoking kills more people than alcohol, AIDS, car crashes, illegal drugs, murders, and suicides combined — and thousands more die from other tobacco-related causes — such as fires caused by smoking (more than 1,000 deaths/year nationwide) and smoke- less tobacco use.

FINANCIAL BURDEN

\$4,620



The amount per household of state and federal taxes Michigan residents pay for smoking-caused government expenditures.

\$11.5 billion



The amount of smoking-caused productivity losses.

\$5.33 billion



The amount of annual health care costs directly caused by smoking.

DESIGNATED YOUTH TOBACCO USE REPRESENTATIVES

Allegan County

Heidi Denton
(269) 633-9719
hdenton@onpointallegan.org

Kent County

Ally Kaza
(616) 367-0575
ally.kaza@kentcountymi.gov

Lake County

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hczarnecki@dhd10.org

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Oceana County

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psantellan@dhd10.org

Ottawa County

Tim Findlay
(616) 393-5776
tfindlay@miottawa.org

The mission of No Cigs for Kids is to educate tobacco retailers about compliance with the youth tobacco act and reduce the number of vendors selling tobacco to minors.