

CCBHC-E National Training and Technical Assistance Center CCBHC Criteria Series

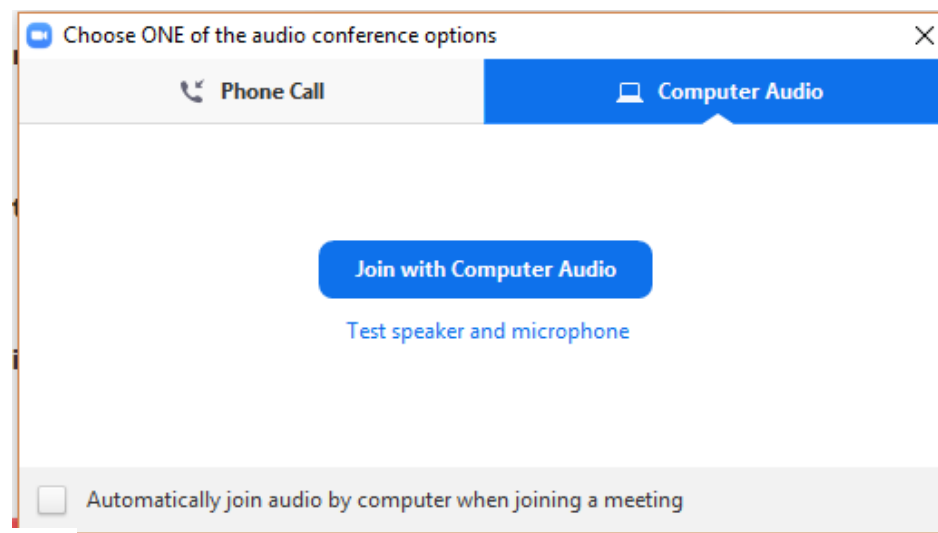
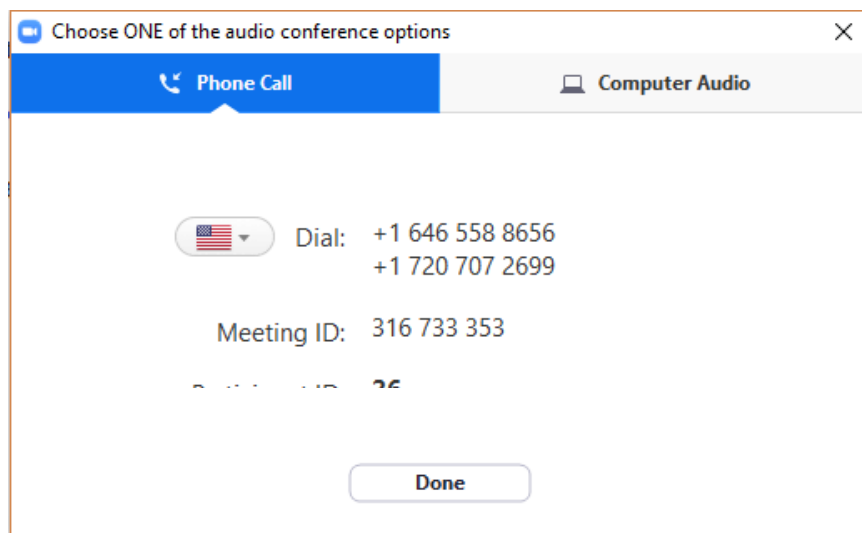
Scope of Services:

Governance – Meaningfully Incorporating Consumer Voice

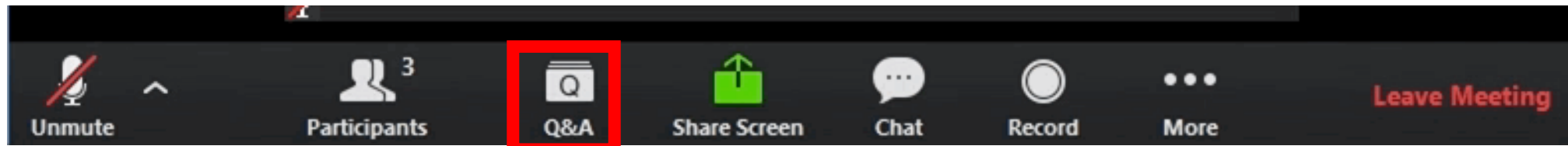
August 23, 2022

Zoom Logistics

- Call in on your telephone, or use your computer audio option
- If you are on the phone, remember to enter your Audio PIN so your audio and computer logins are linked



How to Ask a Question



Share questions throughout today's session using the **Q&A Feature** on your Zoom toolbar. **We'll answer as many questions as we can throughout today's session.**

Acknowledgements and Disclaimer

This publication was made possible by Grant Number 1H79SM085856 from the Substance Abuse and Mental Health Services Administration (SAMHSA). Its contents are solely the responsibility of the authors and do not necessarily represent the official views, opinions, or policies of SAMHSA, or the U.S. Department of Health and Human Services (HHS).

Post Evaluation Survey

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CCBHC-E National TTA Center

[CCBHC-e Webinar Criteria Series: Monthly Follow Up Post Evaluation Survey](#)

[CCBHC Criteria Webinar Series: Optimizing Staffing in the CCBHC Model Evaluation Survey](#)

Thank you for participating in the CCBHC-E NTTA Center event CCBHC Criteria Webinar Series: Optimizing Staffing in the CCBHC Model, hosted on January 25th, 2022. Please take a moment to complete this brief, anonymous post event survey. Your feedback is essential to help us better understand your need for training, technical assistance and resources. Thank you for taking the time to fill in this questionnaire.

* 1. Were you the only one who watched the session on your device?

- Yes
 No

2. If not, how many people were viewing the session with you on your device?

* 3. The speakers for the session provided a very engaging and informative presentation

Please note that we will be sending out a **post-evaluation survey** within the next month to gather your feedback!

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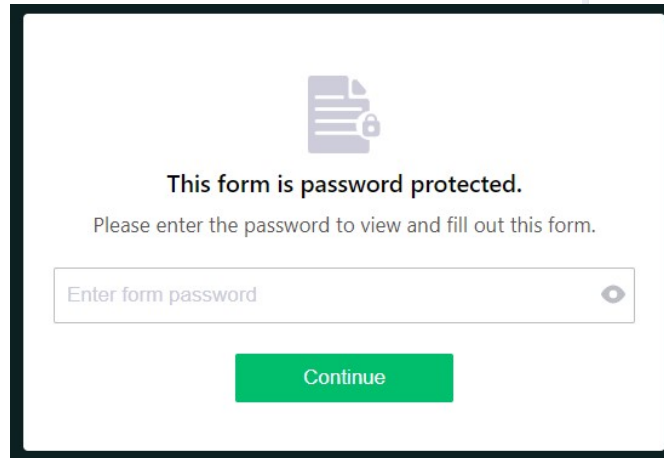
How to Get a *Certificate of Attendance* for this event?

Step 1: Enter Jotform using this link

<https://form.jotform.com/222293297037156>

Passcode: CCBHC

Step 2: Enter the form passcode **CCBHC**. Fill in your information

A screenshot of the CCBHC-E National Training and Technical Assistance Center form. The header includes the CCBHC-E logo and the text "National Training and Technical Assistance Center". Below this is the National Council for Mental Wellbeing logo. The form title is "Certificate of Attendance". The content includes "Criteria Series: Governance - Meaning Incorporating Consumer Voice", the date "August 23, 2022", and a section for entering personal information with fields for "Last Name" (containing "Smith") and "Suffix" (containing "MPH"). There is also a "Sign Here" section with a signature and a "Submit" button.

Step 3: Submit the form and your certificate will be sent via email



Agenda

- Welcome and introduction
- CCBHC Governance Criteria Overview
- Opportunities for Integrating Voices of Lived Experience in Governance – NAMI
- Reflections and Practice from the Field – Newport Mental Health

Learning Objectives

1. Understand CCBHC requirements for meaningfully involving consumers, youth and family members in governance.
2. Learn common and best practices for elevating consumer voice and engaging consumers, youth and family members in governance.
3. Identify examples that have been adopted successfully at existing CCBHCs from peer representatives.

Today's Presenters



Samantha Holcombe
Senior Director Practice
Improvement Consulting
National Council for
Mental Wellbeing



Stephanie Pasternak
Director of State Affairs
NAMI



Deborah Carlson, CPRS, CCHW
Coordinator of Peer Services
Newport Mental Health



Criteria 6.B: Governance

- As a group, the CCBHC’s **board members are representative of the individuals being served by the CCBHC** in terms of demographic factors such as geographic area, race, ethnicity, sex, gender identity, disability, age, and sexual orientation, and in terms of types of disorders. The CCBHC will incorporate meaningful participation by adult consumers with mental illness, adults recovering from substance use disorders, and family members of CCBHC consumers, **either through 51 percent of the board being families, consumers or people in recovery from behavioral health conditions, or through a substantial portion of the governing board members meeting this criteria and other specifically described methods for consumers, people in recovery, and family members to provide meaningful input to the board about the CCBHC’s policies, processes, and services.**
- To the extent the CCBHC cannot meet these requirements for board membership, the **CCBHC will have or develop an advisory structure and other specifically described methods for consumers, persons in recovery, youth and family members to provide meaningful input to the board** about the CCBHC's policies, processes, and services.

*NOTE: Per the CCBHC Criteria, the term “consumer” refers to clients, persons being treated for or in recovery from mental and/or substance use disorders, persons with lived experience, service recipients and patients, all used interchangeably to refer to persons of all ages (i.e., **children, adolescents, transition aged youth**, adults, and geriatric populations) for whom health care services, including behavioral health services, are provided by CCBHCs.*

Today’s Highlights

- Tips for recruitment and quality engagement of individuals and family members on boards and governing bodies
- Practices being employed by CCBHCs to honor and elevate voices of lived experience in governance

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Ensuring Consumer Participation

The [CCBHC certification criteria](#) include a requirement for ensuring consumer participation through a representative board. This requirement can be satisfied in one of three ways:

- **Option 1:** Fifty-one percent of the board is comprised of families, youth, consumers, and people in recovery from behavioral health conditions
- **Option 2:** A substantial portion of the governing board members meet the criteria, and there are other specifically described methods for consumers, people in recovery, and family members to provide meaningful input to the board about CCBHC policies, processes, and services
- **Option 3:** Other means are established to enhance the governing body's ability to ensure that the CCBHC is responsive to the needs of its consumers, families, and communities, focusing on the full range of consumers, services provided, geographic areas covered, types of disorders, and levels of care provided.

*NOTE: Per the CCBHC Criteria, the term "consumer" refers to clients, persons being treated for or in recovery from mental and/or substance use disorders, persons with lived experience, service recipients and patients, all used interchangeably to refer to persons of all ages (i.e., **children, adolescents, transition aged youth**, adults, and geriatric populations) for whom health care services, including behavioral health services, are provided by CCBHCs.*



Ensuring Consumer Participation

Special Exceptions

- If the CCBHC is a governmental or tribal entity, or a subsidiary or part of a larger corporate organization that cannot meet the requirements for board membership under any of the three options, then the following requirements apply:
 - The state must specify the reasons why the usual requirements cannot be met.
 - The CCBHC must have or develop an advisory structure and other specifically described method for consumers, people in recovery, and family members to provide meaningful input to the board about the CCBHC's policies, processes, and services.

Other Representation Requirements

- Members of governing or advisory boards must be representative of the communities in which the CCBHC's service area is located and will be selected for their expertise in related health or community services.
- The criteria require that the CCBHC have a governing board that is representative of those being served in terms of factors such as geography, race, ethnicity, sex, gender identity, disability, age, sexual orientation, and types of disorders.



Opportunities for Integrating Voices of Lived Experience

NAMI

Stephanie Pasternak, Director of State Affairs

Benefits of Consumer and Family Member Representation on Governing/Advisory Boards

- Provides a mechanism for receiving & responding to input
- Helps ensure services meet people's needs
- Promotes a family and consumer-driven system
- Improves communication between staff and people with mental illnesses, substance use disorders & their families
- Promotes respectful effective partnerships
- Increases understanding between all parties
- Provides culturally relevant feedback about the services

Gaining Buy-In from Leadership and Board

- To have meaningful impact, support from CCBHC leadership is essential.
- Strategies for clarifying purpose, impact and gaining buy in (if needed):
 - Connect activity to the over-arching mission of making things better for people being served
 - Identify the opportunity to gather both improvement feedback as well as positive feedback
 - Have clear goals, purpose, and scope of work – formalize the role of the board and board members in writing
 - Opportunity for both staff and consumers/families to understand the complexity of behavioral health system and identify avenues for change
 - Recognize the opportunity to consumer and family members to further build self-determination and leadership skills

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Governing or Advisory Board Recruitment

Tips for Recruitment of Consumer and Family Board Members

- Post a notice in the CCBHC waiting area to let consumers and families know about openings on the board.
- Advertise for consumer and family board members on the CCBHC website.
- Notify new consumers at intake that the board includes consumers and family members.
- For clinicians at the CCBHC, consider alerting consumers and their families when there are board openings.
- Consider that some portion of those who serve on the board may be people in recovery who are not consumers at the CCBHC. This widens the options available to others in the community who are served elsewhere.

Governing or Advisory Board Recruitment

Tips for Recruitment of Consumer and Family Board Members

- Consider asking people who have indicated that improvements are needed to be part of the advisory group—turn that energy into a focus on solutions.
- Reach out to community organizations, particularly those that work with populations that are under-represented on the CCBHC board.
 - Outreach should include local and statewide consumer-run and youth-run organizations; entities run by family members of children, of adult consumers and of people in SUD recovery; and Recovery Community Organizations
- Reach out to state or local advocacy organizations, culturally-specific organizations, and child-serving agencies to ask about consumers/families who may like to serve—and ask staff if they'd be willing to present at a meeting to share their organization or agency's perspective on the kinds of mental health services and supports people need and strengths/gaps in local care.

Remove Barriers to Participation

- **Time commitment:** Hold meetings at same location, date and time each month
- **Compensation:** Reimburse for direct expenses or for time
- **Accommodations:** Be prepared to accommodate individuals with disabilities and offer translation services for individuals with limited English proficiency
- **Transportation:** Hold meetings at locations accessible to participants; consider gift cards or covering costs for public transportation, gas, Uber, etc.
- **Childcare:** Provide childcare during meeting or help cover costs
- **Meals:** Serve meals and refreshments for meetings



Governing or Advisory Board Member Support

Tips for Orienting and Supporting Consumer and Family Board Members

- Make sure potential board members understand in advance the role and responsibilities of the board and its members. This can alleviate misunderstandings before a person joins the board. Consider having a prospective board member sit in on a meeting before they decide whether to join.
- Provide an orientation for new board members to introduce them to other board members and their responsibilities.
- Partner new board members with existing board members to help guide new members for the first three months.
- Mentorship for on-boarding may also include peers, youth, family members who have served on BoD/Advisory Boards, as well as local or statewide youth, family, consumer organizations that may have best practices for serving on Boards and Committees
- Connect consumers, family members, and youth with community mentors and leadership programs, such as statewide consumer and family networks, recovery community organizations, NAMI affiliates and YouthMove chapters



Governing or Advisory Board Member Support

Tips for Orienting and Supporting Consumer and Family Board Members

- Reconsider term-limits or length to better support consumers and family members' learning curve. Term limits and lengths should remain universal for all members, however.
- Avoid conflicts of interest. This includes requiring recusal of the consumer/family member in any decision that involves clinicians providing services directly to them or their family member. This applies to all board members.

Meaningful Engagement

Tips for Quality Engagement

- Do not use clinical jargon or acronyms during board/council meetings.
- Ensure board meetings are a safe space to provide input. Everyone should have a voice at the table and be treated with respect and consideration.
- Consult consumers, youth and families first about policies or procedures changes. Their ideas and feedback should initiate change and where capacity allows, their inputs should be early in design.
 - Are consumers and family members asked for their input before new policies are put into place? Or is feedback only requested after the new/updated policy is written? Consider engaging consumers, youth, and family members of the development of focus group or survey questions.
- Have multiple representatives of individuals with lived experience as a consumer, youth and individuals with lived experience as a family member/caregiver. Being the only consumer, youth or family representative can be isolating and make it more difficult to share ideas and provide feedback.
- Make sure there is dedicated staff to facilitate advisory meetings as well as to handle logistics (meeting space, agendas emailed and printed, travel reimbursement, etc.).
- Provide multiple avenues for feedback (written as well as spoken).



Meaningful Engagement (Cont'd)

Tips for Quality Engagement

- Plan agendas thoughtfully with meaningful opportunities to help shape the quality and scope of services. This may mean having more focused discussions with a limited number of options for the advisory group to consider or as a starting point for a discussion.
 - Open forums are welcome but be sure to also ask for feedback on specific questions and issues.
- Ask to observe the patient advisory meeting of a couple FQHCs, particularly those that say they have a strong consumer advisory council. Talk to the facilitator/staff about “lessons learned” that can inform your CCBHC advisory group.
- Talk with consumer-, youth-, family member-run organizations about best practices for engagement.
- To engage your advisory group, provide data points and ask relevant questions.
 - For example, provide the results of client satisfaction surveys and/or other data and ask, for example, “How can we build on our strengths (the three highest rated areas of our survey/data?” On the 3-5 lowest-rated areas of a survey, for example, ask, “Of these lowest-ranked areas, what would you like our top priority to be as an area of improvement?” “Are there any solutions you’d like to offer for how we might address these areas where we could use improvement?”





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Newport Mental Health

Deborah Carlson
Peer Specialist

CCBHC-E National Training and Technical Assistance Center

Funded by Substance Abuse and Mental Health Services Administration and operated by the National Council for Mental Wellbeing

Peer Perspective: What does meaningful participation in governance of those being served mean to you?

- An important precept of Peer Support is the motto: **Nothing about us without us!** In the context of governance, this means that we as staff, at all levels, work for the people we serve.
- We must take a person-centered approach and support the truth that we are the experts in ourselves, and that our clients are not different. **They are diving the bus!**
- Peer Specialist responsibility to educate and mentor clients to find their voices and advocate for themselves.
 - We may also “hold space” for clients by advocating for them until they are ready to speak for themselves.
- Advocacy extends to using my own voice to advocate on behalf of clients with other staff, whether or not I work directly with the person to keep all discussion:
 - Person-centered
 - Strength-based
 - Recovery-oriented



What practices does the CCBHC you work for do to engage and elevate consumer voice in governance and beyond?

- **Board of Directors**
 - Currently 17 members, all from the catchment area. The majority being people with lived experience as consumers of behavioral health services or family member of an individual with a behavioral health challenge.
- **Consumer Advisory Council**
 - Begun preparation for designation as a CCBHC and has been in active for 3 ½ years.
 - It consists of one Peer Specialist as facilitator and is open to all clients or their family members.
- **Speakers' Bureau**
 - Started four years ago to elevate the voices of people willing to share openly about their personal experiences from a recovery lens.
 - Anyone with lived experience with a behavioral health challenge willing to speak publicly about it is welcome to join.
- **Other Strategies**
 - Advocacy via engagement with outside entities seeking consumer input, i.e., a recent focus Group
 - Evidence gathering survey tools



Successes, Challenges, Lessons Learned

What has worked well?

- Pivot from a medical model to a recovery model of care, both client engagement and satisfaction have improved.
- Staff satisfaction has also grown as the focus has moved from a focus on illness/treatment towards recovery/strengths.

What lessons have been learned?

- Sensation of building the plane while flying it.
- Severe and chronic staffing shortages in traditional team-based areas.
- Culture change takes time and can be met with resistance.
- New initiatives have not always been clearly defined/communicated, causing confusion.
- Balancing necessary and useful trainings to drive change and skill-building for an already overburdened staff.





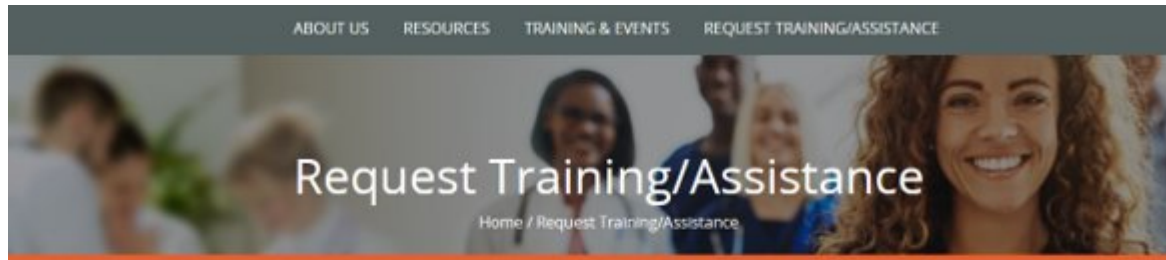
Questions?

Resources and References

- [National Consumer and Consumer Supporter Technical Assistance Centers \(CONSTACs\)](#): The CONSTACS are national peer-run centers that provide training and technical assistance to integrate peers and recovery in behavioral health services and promote evidence-based care for adults with serious mental illnesses.
 - Several centers have lists of local peer or consumer run organizations, on-demand trainings and resources including on board and governance issues and offer TTA.
- [National Alliance on Mental Illness](#): Get connected to resources or local chapters.
- [SAMHSA Guidance](#) on Addressing Governance Board Requirements as a CCBHC.
- Other Resources
 - [National Consumer Advisory Board and the National Health Care for the Homeless Council Consumer Advisory Board Manual](#)
 - [Youth on Boards: Exploring Youth Representation on Your Board or Committee](#)
 - [Engaging Families in Program and Policy Development to Ensure Equitable Health Outcomes for Children](#)



Questions or Looking for Support?



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The CCBHC-E National Training and Technical Assistance Center provides consultation and technical assistance on CCBHC implementation to expansion grantees. Fill out this form to request assistance today.

Request Training/Assistance

Fields marked with an (*) are required.

First name *	Last name *
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Title *	Organization/Company *
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Reminder: Sign up for Office Hours

Thursday, August 25th 2022 – 1:00-2:00pm ET

Register [here](#)

Looking for more time to dive deeper with our presenters,
get your questions answered or exchange ideas?

Join our follow-up office hours session!

Thank You!

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