

Joint Management Task Force
Katie A Settlement
Recommendations for a Shared Management Structure and Accountability,
Communication and Oversight System

July 29, 2014

To: Gregory E. Rose, Deputy Director, Children and Family Services Division, CDSS
Dina Kokkos-Gonzales, Chief, Program Policy and Quality Assurance Branch,
DHCS

Subject : Joint Management Task Force Recommendations

On July 18, 2002, the *Katie A. v. Bonta* lawsuit was filed seeking declaratory and injunctive relief on behalf of a class of children in California who (1) are in foster care or are at imminent risk of foster care placement, (2) have a mental illness or condition that has been documented or—if an assessment had been conducted—would have been documented, and (3) need individualized mental health services, including, but not limited to, professionally acceptable assessments, behavioral support and case management services, family support, crisis support, therapeutic foster care, and other medically necessary services in the home or in a home-like setting, to treat or ameliorate their illness or condition.

In December 2011, a settlement agreement was reached in the case. As part of this agreement and subsequent implementation plan, the California Department of Health Care Services (DHCS) and the California Department of Social Services (CDSS) agreed to perform a number of actions including the establishment of a Shared Management Structure (SMS) to develop a shared vision and mission statement, policy and program direction, clear and consistent guidance, and outcomes and accountability measures consistent with the Core Practice Model (CPM). To this end, the Agreement called for the establishment of a Joint Management Task Force (JMT), an Accountability, Communications and Oversight Task Force (ACO) and a CPM Fiscal Task Force. This document reflects the work and recommendations of these groups.

Over a period of time attempts were made to complete the work of the Joint Management Task Force and many good ideas were gathered. During this period it was also decided to merge the work of the ACO Task Force into the JMT Task Force. In April 2014, the Department of Health Care Services, the Department of Social Services and the Special Master worked with consultants, Beverly Abbott and Pat Jordan to solidify a core membership for the JMT with the goal of completing the JMT recommendations by July 2014. This core membership consisted of:

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- Michaele Beebe, Deputy Director, School Based Policy and Programs, United Advocates For Children and Families
- Diana Boyer, Senior Policy Analyst, County Welfare Directors Association
- Teresa Castillo, Program Policy and Quality Assurance Branch, Mental Health Services Division, DHCS
- Mary Ellen Collins, Voice4Families
- Lyn Farr, Consultant, EMQ Families First
- Patrick Gardner, President, Young Minds Advocacy Project
- Heather Garvin, CMS Support Branch, Children and Family Services, CDSS
- Don Kingdon, Deputy Director, County Behavioral Health Director's Association
- Richard Knecht, Children's System of Care Director, Placer County
- Dina Kokkos-Gonzales, Chief, Waivers Analysis Branch, DHCS
- Vickie Mendoza, Deputy Director, Parent Family Advocate, United Advocates For Children and Families
- Greg Rose, Deputy Director, Children and Family Services Division, CDSS
- Rick Saletta, Special Master
- Tracy Schiro, Assistant Social Services Director, San Luis Obispo County
- Lynn Thul, Consultant for Mental Health Policy and Practice Improvement, California Alliance of Child & Family Services
- Rochelle Trochtenberg Youth Organizer, Humboldt County Transition Age Youth Collaboration

The JMT recommendations are submitted for your consideration. Given the unique challenges of this endeavor, it is expected that as these recommendations are implemented, they will need to go through several stages of evolution and development. It will be important to regularly assess how things are working and where and how improvements can be made.

In submitting these recommendations, we wish to thank all of those who provided input over an extended period of time.