

IM4Q Regional Meeting Minutes  
April 2025

SE – 4/15/25– 15 in attendance  
Central/NE – 4/29/25 – 41 in attendance

Western – 4/30/25 – 29 in attendance

Written by Guy Caruso

**Note:** Text in **blue** indicates an action item to complete. Please note and follow up on your specific action items.

**Note:** These minutes apply to all regional meetings. ODP Regional Leads need only to include additional information specific to their region if desired.

**Note:** Remember, if you have any questions, issues, concerns, please contact Guy, Mary Kay, Lee, and your ODP Regional Lead (BCS and/or BSASP) for assistance.

1. **Welcome/Introductions:** Introductions were made.
2. **Last Meeting Minutes:** The January 2025 minutes were shared and no changes made.
3. **Contacts and Announcement Update:**
  - **Please send** any name, email, and/or telephone number (and, if applicable, extension) changes to Lee ([lstephens@pa.gov](mailto:lstephens@pa.gov)) and your ODP Regional Leads, so that an up-to-date contacts list can be maintained. Lee has created a shared file with the regional leads to manage these updates.
  - **Please review** the Announcements when they are issued, as they include important IM4Q information of which to be aware.
  - **Please send** Guy ([guy@temple.edu](mailto:guy@temple.edu)) any highlight story or meaningful consideration you are proud of so it can be shared in an Announcement.
4. **Annual Statewide Training (AST 2025):**
  - 2025 AST (our 25<sup>th</sup> year) will be in person on July 29-30 (1½ days) at the Harrisburg Hilton.
  - Mary Kay informed everyone that when one supports coordinator registers to attend, a second SC can attend with free registration. Please share this information with the SCOs.
  - Mary Kay encouraged **AEs and Local Programs** to create baskets of various items to be auctioned off during the ice cream social.
  - The cost to attend the AST is \$75.00 and a block of rooms at the Harrisburg Hilton is available for \$159 per night.
  - **Local Program Coordinators/AEs:** if there are any questions that you would like to have ODP Deputy Secretary Kristin Ahrens address at the AST, please send them to Lee Stephens **by 5/30**.
5. **Enterprise Case Management (ECM) Update:**
  - Lee shared that she, Mary Kay, and the ECM workgroup will meet the week of 4/21 for Discovery Sessions. Also, the AAW and the state centers will be included in the new platform. Because ODP has more extensive processes to implement, it will be one of the last program offices to roll out for implementation. An updated proposed timeline has not been shared.
  - Lee shared draft Pre-Survey and Considerations Process flowcharts for reference. She indicated that the eventual hope is for ECM to send pre-survey data directly to ODESA and eliminate the need for local programs to manually enter the data.
  - A small subgroup worked to update the primary and secondary consideration themes, and this was submitted to Accenture, the vendor creating the new platform.

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- Major Concerns had an additional item added, Evidence of a Mental Health Concern Not Addressed, which would include an urgent need for new or additional services.
- For updated information on ECM, see <https://www.pa.gov/agencies/dhs/resources/ecm.html>.

### 6. ODESA:

- Mary Kay went over the process of when one should enter an NCI Presurvey and Background Information:
  - \* The IM4Q Pre-survey is done for everyone interviewed.
  - \* The Time Spent Form is done for everyone interviewed.
  - \* The NCI Pre-survey and Background information are only done for people on the sample with an X in the QMS column.
  - \* If there is no X in the QMS column, local programs can skip screens to leave the questions blank and proceed to IPS sections 1 and 2.
  - \* Enter PA State Supplement (all sections).
- HSRI and its vendor will add customizations to ODESA 2.0 for PA, which should be ready in November 2025. Training will be scheduled prior to the opening of the cycle.
- Questions were asked, and Mary Kay has asked for HSRI guidance. **(VERY IMPORTANT)**
  1. This year, everyone in our sample is receiving the NCI IPS, but only those included in PA's statewide sample (app. 700 surveys – name with a X after them) will also get the NCI pre-survey and background information completed. As the Local Program staff begin entering the surveys, they notice that the first part (pre-survey section) is shaded grey and they can't enter it, but they can enter the background information. Do you have an idea as to why they can't enter the pre-survey?  
**Answer: It is a User Administration Problem.**
    - Log into ODESA → Administration tab → User Accounts → Actions dropdown → Edit User.
    - Scroll to Access to Sections in the IPS and make sure YES is checked for all. This will allow you to enter the presurvey.

The screenshot shows a web form titled "ACCESS TO SURVEYS". It contains several dropdown menus for different survey types, all of which are currently set to "Yes". Below this is a section titled "ACCESS TO SECTIONS IN THE IPS" with three dropdown menus: "Pre-Survey", "Background", and "Survey (interview)", all also set to "Yes".

ACCESS TO SURVEYS	
In-Person Survey (IPS):	Yes
Adult Family Survey:	No (state is not participating)
Child Family Survey:	No (state is not participating)
Family/Guardian Survey:	No (state is not participating)
IM4Q Pre-Survey:	Yes
IM4Q EDE State Center Supplement:	Yes
Family/Friend/Guardian Survey:	Yes
IMQ Time Spent:	Yes

  

ACCESS TO SECTIONS IN THE IPS	
Pre-Survey:	Yes
Background:	Yes
Survey (interview):	Yes

- Click on Save.
  - If you have not entered the NCI pre-survey for a completed interview that needs it, **PLEASE DO SO**. If you are unsure how to proceed, contact Mary Kay ([mary.kay.cunningham@temple.edu](mailto:mary.kay.cunningham@temple.edu)).
2. Does every attempt at an interview need to have the Survey Status section completed?  
**Answer: Yes, it should be finished/finalized or saved for those that did not have the rest of the survey completed.**
  3. Regarding the individuals that we do not interview: Below is the response received in the beginning of the cycle: **Q18:** In ODESA, do we just “save” the survey status or do “finish” it, which skews our completed survey total.

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**Response: “Finish” completed surveys and “Save “ the ones that are not completed after the status report.**

4. What do we do with the Time Spent form? Do we “save” or “finish” the time spent form for the individuals we do not interview?

**Response: Save the forms for people not interviewed.**

7. **New Information Sheets:** Lee will share the Supports Coordinator and Provider Information Sheets for distribution once they have been finalized. Both sheets received positive feedback from small groups of their target audiences. Also, ODP will distribute both information sheets through their respective listservs.
8. **Recording Responses When Family Members are Paid Staff:** Mary Kay stated that family responses should always be recorded as family, even if the family member is in a paid staff role. Mary Kay will review the instrumentation to make any changes necessary for the next cycle.
9. **Family Survey 2023 & 2024 -Concerns Shared:**
  - Guy reviewed the negative comments family shared in the 2 years of asking families about IM4Q. He put the comments into theme areas and asked that local programs share such information when training monitors for the next cycle.
  - It was suggested SCs inform families at a person’s ISP about IM4Q, and Guy will explore getting information about IM4Q to family groups/associations.
10. **Updates/Questions/Concerns:**
  - ODP ID/A leads
    - Southeast - Mark Costello introduced himself as the new lead and explained he has had experience as a monitor for IM4Q in the past.
    - Central/Northeast – Maureen and Karla are receiving monthly reports in a timely fashion.
    - West – Laura reinforced the importance of sending her monthly reports by the 10<sup>th</sup> of each month whether surveys were completed or not. She indicated that if they had to use the Group Z category, local program coordinators should let their ODP regional lead know. as ODP is tracking this for the Quality Measure Sample (QMS).
  - AAW leads – Local programs were reminded to complete all AAW interviews and enter data by 4/30/25. Steve, Agnes, and Jennifer had all been in contact with their local programs prior to the meetings.
  - Local Programs/AEs
    - -Southeast – Javier had a question on #7 on the Monthly Report on follow up that Lee, Mary Kay and Guy will review. See also Item #12.
    - Central and Northeast – See Item #12.
    - West – See Item #12.
  - Ebensburg/Selinsgrove Centers
    - Colleen Youngcourt reported that Abigale Bowen is the new lead for Ebensburg, replacing Alisha Walker, and Abigale introduced herself. Both the Advocacy Alliance and St. Francis have been able to conduct in-person interviews.
11. **Additional Topics Not Previously Addressed:** None.
12. **Questions for Discussion:**
  - **What were the general impressions of the sampling changes?**  
Southeast – Has led to a slower process and some challenges in the beginning. The B and L categories seem to be problematic. To get interviews done, alternates have been requested earlier. Local Program Coordinators have tried to complete the groups in the order given, which can be difficult. Guy reminded everyone that Ron Melusky said that if a local program was stuck in the order, it was acceptable to move

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around. The new samples have shown a more diverse population to interview. The main question now is whether the Federal direction on DEI will impact next year's sample.

Central/Northeast – Sampling is like “playing Bingo” with filling in the squares. It was not easy at first, scary even, and over time, it did improve. It has led to a more diverse group of people to interview, requiring Spanish interpreters, as well as seeking out bi-lingual monitors. Local programs have had to reach out to churches who provide services in Spanish, as well as seek out Hispanic community groups to recruit for monitors. **REMEMBER – If using an interpreter, local programs need to work with the AE regarding costs, as the AE is supposed to pay for interpreters (ASL/other).**

West – For some local programs this has been a slower process, as getting pre-surveys can take longer when doing the sample in order and there has been a refusal and another person is needed in that category. Some programs have requested several alternate pre-surveys, which has helped with speed and lessening the work of SCs.

Overall – **Guy** will collect ideas from local programs for addressing sampling concerns and making the process move more smoothly.

- **Were there challenges in scheduling interviews as opposed to previous years?**

Southeast – Lots of legwork to get correct telephone numbers (used HCSIS to find these). There was a question and discussion on whether to receive consent for an interview and then have the presurvey completed, or to have a pre-survey completed first and then receive a refusal can make scheduling more difficult.

Central/Northeast – Several local programs use the AAW strategy and reach out to Supports Coordinators (SCs) for assistance. They ask for the SC's permission to put their name/contact information on any email/mail correspondence to gain credibility and to not be seen as scammers. For some people, there is trouble in getting correct address and contact information, so contact the AE IM4Q lead for assistance. Another issue was that the house manager's contact information on the pre-survey may not be the correct person to arrange for an interview, causing a delay since they do not know the person the best or their personal schedule. Unfortunately, this is a reality as the house manager needs to give you the residence contact to see who knows the person the best.

West – As there is a more diverse sample, interviewers need to be more culturally sensitive (e.g. for some cultures, too much eye contact may be offensive). Also, finding interpreters, creating contracts, and payment methods have taken time, even though the AE eventually pays for such service.

- **How did interviews go using the NCI IPS and PA State Supplement?**

Southeast – They are still long.

Central/Northeast – Length of NCI IPS is an issue yet. The PA State Supplement is shorter than the EDE and most repetitive questions have been removed. Local programs were glad the community participation chart was removed.

West – Having one instrument has made it easier for monitors versus the multiple instruments in the past.

- **Were there any concerns with specific questions this year?**

Southeast – Questions on self-directed services and employment questions are being sent to **Mary Kay** for a response and possible future change in response set.

Central/Northeast – The NCI questions should be plain language/simplified. **Mary Kay** will confer with HSRI on their instrument length and using plain language. Asking people the race/ethnicity question can be difficult, so rewording this can help, as well as training monitors about how best to do so.

West – There were concerns with some family as staff and some staff-related questions that **Guy** is following up on.

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- **Are there any new “best practices” discovered this year?**

Southeast – **Javier** to share his spreadsheet that he feels has made him more efficient.

Central/Northeast – Some strategies to more easily work with the sample were shared and **Guy** will follow up to share specifics. Hiring monitors with disabilities (e.g. autism) works and they are an asset. With the proper one-on-one training, and if necessary, contacting the person’s team for ideas as to how best to train and support the monitor works well.

West – For each letter category in the sample, having a few alternate pre-surveys helps to save time for SCs. Meeting monthly between the AE and local program is very helpful.

**13. Next Meetings** (all scheduled 10am – 12pm via Zoom)

Southeast: 10/22/2025 - <https://temple.zoom.us/j/7012982802?omn=98574198389>

Central/Northeast: 10/21/2025 - <https://temple.zoom.us/j/7012982802?omn=98770927264>

Western: 10/23/2025 - <https://temple.zoom.us/j/7012982802?omn=97373661730>