

SAN MATEO COUNTY
MENTAL HEALTH SERVICES DIVISION

DATE: March 25, 2000

MENTAL HEALTH POLICY NO.: MH 00-03

SUBJECT: Flexible Funds

AUTHORITY: Divisional

AMENDED: February 25, 2005

SUPERSEDES: Amended October 12, 2005

ATTACHMENTS

- A. Youth Flexible Funds Application Information
- B. Child-Youth Flexible Funds Request Authorization Form; B1-Child Youth **NMT** Flexible Funds Request Authorization Form (added 3/14)
- C. Youth Transition, Adult/Older Adult Flexible Funds Application Information
- D. Youth Transition, Adult/Older Adult Flexible Funds Request Authorization Form
- E. Supplemental Housing Funds
- F. Housing Assistance Fund Application Form
- G. Other Sources of Flexible Funds

BACKGROUND

The effective and efficient use of available flexible funds can be instrumental in helping to fulfill the mission of Mental Health Services (...to enable youth and adult clients to live successfully in their communities).

Flexible funds are financial resources that are used within a community-centered, strengths-based, needs-driven planning process. They can provide or enhance individualized rehabilitative services and supports for adult consumers and for youth consumers and their families. Funds are derived from a variety of sources and for a variety of specific purposes. As opportunities expand to provide needed resources for clients, it is important to assure that specific funds are appropriately selected and utilized.

PURPOSE

- To define the use and availability of flexible client funds.

- To assure that consumers have equal access to flexible funds, by creating consistent standards for eligibility and accountability.
- To maximize available resources by assuring that the most appropriate flexible fund is selected for any given identified need.

POLICY

Mental Health Services supports the appropriate use of flexible funds – to provide and enhance treatment and rehabilitation/recovery opportunities; to support consumers living in the community; and to contribute to improving quality of life for adults, young adults, older adults, and youth who are our beneficiaries.

All clinicians should become familiar with the range and intent of flexible funding, in order to assure that consumers and their families have every opportunity to benefit from this resource.

Application for flexible funds in any category must not occur until other available funding resources have been explored.

Eligibility

Access to flexible funds shall be available to all adult and youth consumers meeting funding criteria.

- Adults (including young adults and older adults)

Flexible funds managed by Mental Health Services are restricted to the support of clients with serious and persistent mental illness who are currently open to a service provider within the county system of care (i.e., receiving clinic-based care and/or served by a community mental health rehabilitation agency).

A clinician, using established protocols, shall request flexible funds; their use shall be a component in an established plan of care.

Whenever possible, grants from adult flexible funds shall be considered loans, and appropriate payback plans are strongly encouraged.

- Youth

Flexible funds managed by Mental Health Services are available to any child/youth served with the Youth System of Care.

A clinician or a representative of a collaborative agency, using established protocols, shall request flexible funds; their use shall be a component in an established plan of care.

Fund Management

Funds may be managed within County Mental Health or be handled through a contract with an agency.

Funds shall be managed and disbursed using standard accounting methodologies.

The available dollars for dispersal shall be identified at the beginning of each fiscal year, and dispersal from that total, with categorical detail, will be reported to Adult and Youth Services Managers.

Clinical Services

Mental Health Services is responsible for providing necessary clinical services for all beneficiaries. When a necessary service appears unavailable through ordinary resources, please refer to MH Policy #97-07, Unique Clinical Circumstances, for information on how to apply for funding.

Clinical Services may not be reimbursed through the use of flexible funds.

- Substance use treatment services for a dually diagnosed client are considered clinical services.
- Durable goods or equipment for the treatment of mental health disorders may not be provided using flexible funds.
- Adult One-to-One Requests are considered clinical services.

Fund Descriptions

- **Housing Supplemental Fund – Adults**

Definition: A resource that provides short term funding to help eligible consumers to obtain or maintain community housing.

Examples of appropriate uses: Requests for first and last months' deposits, security deposits, payments to housemates to hold a share in a living space, assistance to clients when a roommate leaves.

Exclusion: This fund may not be used as the only or primary resource for ongoing rent.

- **Adult Flexible Funds**

Definition: A resource that provides short term funding to enhance the ability of the consumer to increase or maintain productive activity in the community.

Exclusions: this fund may not be utilized to provide housing supplements or additional clinical services. Requests for financial support for acquisition and/or repair of significant private property (ex. automobile) will not be a priority of this fund.

- **Young Adult Flexible Funds**

Definition: A resource that provides short term funding to enhance the ability of the consumer to increase or maintain productive activity in the community. Further, this fund may be used to augment social, recreational, and educational pursuits of young adults.

Exclusions: This fund may not be utilized to provide housing supplements or additional clinical services. Requests for financial support for acquisition and/or repair of significant private property (ex. automobile) will not be a priority of this fund.

- **Older Adult Flexible Funds**

Definition: A resource that provides short term funding to enhance the ability of the older adult consumer to increase or maintain productive activity in the community. Further, this fund may be used to acquire or augment social, recreational, or health services for older adults.

Exclusions: This fund may not be utilized to provide housing supplements or additional clinical services. Requests for financial support for acquisition and/or repair of significant private property (ex. automobile) will not be a priority of this fund.

- **Children's Flexible Fund**

Definition: A resource available to children and youth who may be identified by any partner in the child/youth system of care. It is designed to provide necessary goods and services to enhance quality of life for identified child/youth beneficiaries. This highly flexible resource is capable of funding social, recreational, academic and other services that may contribute to the enhanced well-being of the child/youth.

Exclusions: Should not be used to fund clinical services.

Note: This fund should be distinguished from the range of goods and services that will be provided to a specific set of high-risk youth enrolled in the Wraparound Program.

Flexible Funds Managed Outside of Mental Health Services

Aging and Adult Services, Human Services Agency, and other non-county resources manage other funds that may be available to Mental Health clients. These funds should be considered prior to requesting Mental Health Flexible Funds. See Attachment G for further information.

Procedures

Application procedures for the various flexible funds are defined and determined by the managers of the fund. See attachments and references for current procedures for accessing alternative funds.

Approved: _____
Gale Bataille, Director
Mental Health Services Division

Reference: MH Policy 99-07, Referral Procedures (Clinical) – Unique Circumstances

Reformatted: 8/25/05

Reviewed: _____

