

## The Planning Process—A Summary

The Waiting List Planning Group initially met on **March 25, 1999** in Harrisburg, Pennsylvania. The Work Group learned about the national perspective, including the root causes of waiting lists across the states and brief presentations on the waiting list initiatives in other states. This was followed by a detailed presentation by representatives from Maryland on the Maryland Waiting List Initiative. Finally, the Work Group was oriented to the Pennsylvania Waiting List Study by Temple University and the work to be done in Pennsylvania as addressed in the Multi-Year Plan under the goal of resource realignment to realign existing services to meet the needs of those on the waiting list, as well as recommendations regarding the movement of persons out of State Centers. It was emphasized from the start that the Plan to address the waiting list is both a plan to address the needs of particular people and an effort to establish a system and a process to address the management of the waiting list over time.

The **second meeting** of the Waiting List Work Group was held on May 5-6, 1999, and it represented the first real working session of this group. During the May meeting, the Work Group defined the purpose and the scope of the Plan and developed an outline of the waiting list Plan.

**Purpose:** The purpose of the waiting list planning effort is to develop a plan and a budget to address the needs for services including both persons currently on the waiting list for services and persons not on the waiting list but expected to request services.

**Scope:** The plan will include all persons other than those needing early intervention supports and services. The plan will examine state policies and procedures and their implications at the county level.

Next, OMR presented initial information on people served and

associated costs. Temple University then presented the results of the Temple Waiting List Study. The data indicated that a total of 14,083 persons were waiting for mental retardation services across Pennsylvania, including 411 persons, or 2.9% of the total in the Emergency Needs Group (individual needs services immediately); 3,244 persons, or 23.0% of the total in the Critical Needs Group (individual needs services within one year); and 10,428 persons, or 74.0% of the total in the Planning for Needs Group (individuals' projected needs are greater than one year away). The study grouped services by category and grouped persons by Low, Medium, or High Intensity Services. One important finding was that an average of 49% of the individuals who came into service during the year under study was not on waiting lists. This began to be commonly referred to as the "shadow waiting list." In summary, the Temple Waiting List Study revealed that there are 411 persons in Pennsylvania who need services immediately (Emergency Need); and 3,244 persons who need services within the next year (Critical Need).

Following the presentation of the Temple data, the Work Group began to review and to discuss service and support packages and associated costs. The Work Group identified issues and priorities and began to structure resource groups that could be used to inform the Work Group members and to assist in their deliberations for the next meeting.

The **third meeting** of the Waiting List Plan Work Group was scheduled for June 14-15, 1999. The June meeting focused on the capacities of families, providers, counties, and the state to expand services to meet the needs of persons on the waiting list. Numerous issues related to capacity were identified for discussion and review by the Work Group for possible recommendations to be included in the Plan. The Work Group then began to identify priorities for services and supports within broad categories of service; for example, family support services, day supports, residential supports, etc. It was agreed that for the next meeting, members would vote