

NAMI Juneau – Transition to Third-Party Billing for Peer Support Services

NAMI Juneau has been a peer support organization since 1986, when it was known as the Juneau Alliance on Mental Illness. Over that time, hundreds of primary and secondary Trust beneficiaries have participated in our peer-led education and support services. A constant over the past forty years has been our ability to adapt to changing community needs. Most notably:

- Spinning off JAMHI Health & Wellness to provide rehabilitative housing
- Launching Polaris House
- Employing contract therapists in Juneau School District's Teen Health Center
- Merging with the Juneau Suicide Prevention Coalition

These changes were driven by community needs and shifts in Alaska's funding landscape. NAMI Juneau is now evolving again in response to changes in the mental health landscape locally and statewide.

In 2025, NAMI Juneau's Board of Directors committed to exploring billable services to strengthen and sustain our current offerings. This goal was added to our strategic plan, and we secured consultation funding to guide the process. The Transition to Third-Party Billing for Peer Support Services project builds on that work to answer a critical question: can Medicaid-reimbursable peer support services be implemented in a way that aligns with our mission and values while expanding access to sustainable recovery support?

Project Overview

NAMI Juneau currently employs contractual therapists who are grant-funded to provide therapy to youth in a variety of community settings. NAMI Juneau has policies, insurance, and administrative capacity to support this activity.

NAMI Juneau has begun preparing to bill for outpatient therapy as part of a broader effort to expand community access to care. The first step is working with Agnew Beck to determine the administrative requirements for different levels of outpatient billing. This includes a revenue analysis of each level of outpatient service provision (sole practitioner, group practice, Medicaid-enrolled provider, partnership with a Medicaid-enrolled provider, etc.) for programs as they currently operate and as we expect them to look in five years. NAMI Juneau has the financial reserves to make this transition once a clear plan is in place.

We also believe that adding outpatient therapy will create a new entry point into our peer-led services, which are currently grant-funded. Many participants are eligible for and already receive rehabilitative services from other providers in Juneau. The services we offer can be billed by approved organizations; the missing link is NAMI Juneau's current inability to bill for

them directly. By building administrative capacity and strategic partnerships, we believe our adult peer-led programs can become more financially sustainable while relying on fewer grant dollars.

The following section describes the adult peer-led programs that are the focus of this application. With support from the Alaska Mental Health Trust Authority, we believe we can increase billable revenue from these programs and strengthen their long-term sustainability.

Medicaid-Billable Service #1 – Support Groups

We offer three peer-led support groups: a DBT group study, Creative Growth, which is art-based, and Connection, a general mental health wellness planning group. All three have been shown to be effective in clinical studies.

In the past year, 35 unique individuals attended more than 250 times. Seven contractual facilitators lead these groups, and four are certified Peer Support Associates. The number of groups, types of groups, and attendance have all grown in the past year.

Our long-term sustainability plan for these groups is to bill Medicaid for eligible services.

Our work plan for the grant period:

- During quarterly facilitator meetings, we will prepare facilitators for potential billing roles by discussing workflow, responsibilities, and new requirements.
- Research additional peer-led support groups, such as Whole Health Action Management.
- Certify all facilitators as Peer Support Associates.
- Use Agnew Beck's consultation to determine whether groups should be provided in-house, in partnership with a community mental health provider, or through an organization that can bill Medicaid.
- Use Agnew Beck's consultation to determine what changes are needed to make each group billable.

Medicaid-Billable Service #2 – Individual Recovery Support

We provide individual recovery support to about 45 people each year. This service is provided by certified Peer Support Associates. Some participants are long-standing, and some are new.

This is a Medicaid-billable service. However, our long-term model includes a mix of grant-funded and billable encounters to reduce barriers for new participants.

Our work plan for the grant period:

- Upon completion of Agnew Beck's analysis, determine the best course of action to bill for the support provided to repeat support recipients.
- Continue to provide initial support to individuals using grant funds.

Medicaid-Billable Service #3 – Mental Health Trust Mini Grants

We submit 33 mini grant applications each year. This work is done by a Peer Support Associate.

Our long-term sustainability plan for this service is to pursue Medicaid billing if Agnew Beck's analysis supports that approach.

Our work plan for the grant period:

- Upon completion of Agnew Beck's analysis, determine the best course of action to begin billing for this service.

Peer Support Associate Class

We have taught more than 80 people to become Peer Support Associates in the past five years. One staff member and one contractual facilitator, both certified Peer Support Associates, teach the class. During the grant period, we have agreements with UAS and SERRC to provide one class with each organization. We hope these demonstration projects will lead to collaborative funding.

We will also provide one Peer Support Associate refresher course. We are currently seeking a partner and believe we can find a community mental health provider that will participate and receive continuing education credits for its staff.

This class is not billable, but we believe we can lessen our reliance on grants by partnering with others.

Our work plan for the grant period is to show partners that these classes align with their mission and then contract with them to provide the classes at no cost to NAMI Juneau by year two of the grant period.

Support and Coordination of Services

NAMI Juneau receives strong community support for its services. In FY25, more than 300 individuals donated over \$90,000. In addition, NAMI Juneau is regularly invited to speak on mental health topics in the media and by local organizations.

Feedback from potential service recipients is reflected in both our most recent needs assessment, which engaged more than 250 individuals in our community, and our program evaluations. As described below, we use evaluation information to refine and prioritize programming.

This project will require partnership with Agnew Beck, UAS, SERRC, and likely a community mental health provider. We have had preliminary discussions with providers about collaboration but are waiting for Agnew Beck's work to conclude before beginning formal partnership conversations.

We maintain relationships with referring agencies through regular print outreach, a Juneau mental health listserv with more than 80 participants, one-on-one conversations with agency leadership, and regular participation in community planning meetings and task forces. Referrals work best when agencies know the criteria for participation, the tone of the program, and details such as date, time, and location.

Data and Evaluation Methodology

NAMI Juneau has used a results-based methodology to evaluate its programs for years. This methodology is detailed in our evaluation plan, last updated in 2023. Aaron Surma leads this work and brings ten years of experience supporting quality improvement and evaluation projects in community mental health settings.

How Much

We track the following outputs:

- Number of services offered
- Total unique attendees
- Total attendance

Outputs are measured in our project database. Staff review and update the database on a weekly basis.

How Well

We measure participant satisfaction after each interaction. Paper and digital surveys provide multiple ways to give feedback. All results are stored in the same evaluation database. We track:

- Beneficiary status
- Satisfaction with the program
- Satisfaction with the facilitation

Additionally, we work with facilitators quarterly to review:

- Proper certifications (such as PSA status)
- Fidelity to programs

Facilitators can also provide feedback on what they need to ensure fidelity to each program.

Better Off

Once a year, we ask everyone who has engaged in our programs whether they are better off as a result. We ask whether the program supported them to:

- Increase quality of life
- Increase the ability to manage challenging situations
- Increase the ability to manage challenging behaviors
- Become stably housed
- Decrease substance use
- Decrease legal involvement
- Increase healthy behaviors (e.g., physical activity or personal care)
- Reduce the number of days of poor physical or mental health
- Connect to benefits programs such as Medicaid, SNAP, and mini grants

Evaluation results are reviewed by staff and facilitators quarterly. These discussions focus on changes needed to ensure each program fulfills its purpose. Results are also reviewed annually to determine whether each program is the best use of our limited resources. This process initially led to program turnover. Over time, it has helped ensure that our current programs reflect our mission and values and remain effective ways to support our community.

History of Providing Similar Services

As noted above, NAMI Juneau has a forty-year history of providing peer support services. Peer work is foundational to everything we, and all other affiliates, stand for.

Executive Director Aaron Surma provided technical assistance to community mental health providers for eight years. During that time, he supported more than 150 providers in adding primary care and peer support services. This work included billing workflows, sustainability models, patient workflows, and staff training. He brought this experience to Juneau Youth Services before moving into his current role as Executive Director of NAMI Juneau. He is also a Peer Support Associate.

Program Coordinator Meryl Connelly Chew has administered peer-led support services for three years and provided shelter support, including some peer-led services, for six years before that. Their experience as a peer supervisor and provider makes them a strong fit for this project.

Agnew Beck will provide technical assistance for our transition to billing. We have already secured funding to work with Agnew Beck on a comprehensive transition plan beginning in fall 2026. Agnew Beck has decades of experience supporting organizations across Alaska. NAMI Juneau and Agnew Beck have also worked together on multiple projects in the past five years.

While this transition will require substantial operational change, Agnew Beck's consultation will provide the clarity and structure needed to move forward effectively.

NAMI Juneau's Board of Directors has committed to this work through our most recent strategic plan. The Board understands that billing for some services is crucial to the long-term viability of our work. It also recognizes that partnerships, and potentially transferring some programs, may be viable ways to ensure these services remain available in the community, regardless of who ultimately provides them.

NAMI Juneau's accounting is provided by Elgee Rehfeld, the largest CPA firm in Juneau. Elgee Rehfeld has provided accounting services to NAMI Juneau for six years and has experience with bookkeeping, tax preparation, and audit requirements for nonprofits like NAMI Juneau.

NAMI Juneau has a history of meeting the Alaska Mental Health Trust Authority's grant requirements and can do so for this grant as well.

Staff Orientation and Training

As noted elsewhere in this application, the specific training required of NAMI Juneau staff will be informed by Agnew Beck's work. However, some known work will begin before that analysis is complete. This work is detailed in the Project Overview section.

Ensuring the safety and confidentiality of both clients and staff has always been a priority. We have a formal orientation program for new facilitators that covers safety in the context of the program, the surrounding environment, supports available immediately and after an unsafe incident, and proper reporting and debriefing. Similar information is provided to all participants. All safety procedures are based on requirements from our insurance providers and NAMI National best practices. Safety policies are reviewed during quarterly facilitator check-ins, and one-on-one consultation occurs as requested by facilitators or when concerns are identified by staff.

Client confidentiality currently follows state and federal standards, based on consultation with Foraker Group in 2019. Any confidentiality requirements that change as a result of this project will be addressed through consultation with Agnew Beck.

Budget Narrative

The budget for year one is as follows:

Executive Director Salary - \$40,000

One-third of the Executive Director's time will be dedicated to this project. Key responsibilities include:

- Work with Agnew Beck on the development of their report
- Work with the Board of Directors to choose courses of action based on the results of the report
- Implement policies and procedures based on the Board of Directors' decisions about the level at which to bill for services
- Pursue partnership with other entities for individual programs (such as Peer Support Associate class) and to provide billing/administrative support for other programs (such as support groups)
- Teach two sessions of Peer Support Associate class and one refresher class
- Provide peer individual recovery support
- Facilitate Connection support group

Program Coordinator - \$45,000

One-half of the Program Coordinator's time will be dedicated to this project. Key responsibilities include:

- Work with the Executive Director to draft new policies and procedures related to facilitation
- Train support group facilitators
- Provide peer individual recovery support
- Process mini grants
- Market and coordinate support groups and Peer Support Associate class

Total personnel services cost in year one: \$85,000

Supplies - \$15,000

Supplies include lunch, print materials, snacks, crafting items, and other materials used for Peer Support Associate class, support groups, and individuals receiving support or mini grants. This expense is expected to decrease in year two as partners assume some class-related costs.

Other Costs – Facilitation - \$10,000

These funds support contractual peers who facilitate support groups and the Peer Support Associate class.

Other Costs – Peer Support Associate Filing Fees - \$5,000

These funds cover the cost to certify or recertify 25 Peer Support Associates. This expense is expected to decrease in year two as partners assume some of these costs.

Total other costs in year one: \$15,000

Grantee Requirements

- NAMI Juneau is eligible under 20 AAC 205 and is shown as in good standing in the state's nonprofit corporation database.
- NAMI Juneau's current 501(c)(3) status is confirmed in the IRS Tax Exempt Organization Search.
- NAMI Juneau's State of Alaska business license number is 964093.
- The following documents are attached to this application:
 - o Current governing board roster
 - o Strategic plan
 - o Organization chart – staff
 - o Organization chart – projects
 - o Key staff resumes
- FY25 financial statements for the year ending June 30, 2025, are attached.
- The 990 is attached.
- NAMI Juneau does not meet the state or federal government's requirement for a full financial audit. This has been confirmed through consultation with Foraker Group in the past year.
- The service area for this grant application is Juneau, Alaska, which is in 1115 Waiver Region 7
 - o Services will be delivered in-person
 - o Partnership and coordination strategies are described in this application
- Other funding for the project described herein is provided by:
 - o Unrestricted fund balance - \$50,000
- Signature from authorized representative of NAMI Juneau



Aaron Surma
Executive Director
NAMI Juneau

Dated 6.8.26

Logic Model & Timeline

Overall program Goal: Support mental health in Juneau by providing peer-led education and support services.

Inputs	Activities	Outputs	Outcomes
Staff & FTE .3FTE Executive Director .5FTE Program Coordinator Funding Up to \$115,000/yr Partners Agnew Beck UAS SERRC Community Behavioral Health Provider - TBD Data Survey data from program participants Community Infrastructure and assets	Goal 1 – Support Groups		
	DBT Group Creative Growth Group Connection	52 Groups 45 unique individuals attend at least one group 300 people (duplicated) are in attendance during the year All facilitators are certified Peer Support Associates	Better off in terms of: - Quality of life - Ability to manage situations & behaviors - Stably housed - Decreased substance use - Decreased legal involvement - Increase healthy behaviors - Reduced number of days of poor health - Connected to benefit programs Participant satisfaction with service
	Goal 2 – Individual Recovery Support		
	Individual recovery supports provided to people with mental illness and/or substance use disorder	Supports provided to 45 individuals 90 total interactions Individual Recovery Support providers are certified Peer Support Associates	Better off in terms of: - Quality of life - Ability to manage situations & behaviors - Stably housed - Decreased substance use - Decreased legal involvement - Increase healthy behaviors - Reduced number of days of poor health - Connected to benefit programs Participant satisfaction with service
	Goal 3 – Mental Health Trust Mini Grants		
	Complete and submit mini grant applications. Assist individuals to purchase and receive items afterwards.	Submit 33 mini grant applications Mini grant submitters are certified Peer Support Associates	Better off in terms of: - Quality of life - Ability to manage situations & behaviors - Stably housed - Decreased substance use - Decreased legal involvement - Increase healthy behaviors - Reduced number of days of poor health

			Participant satisfaction with service
	Goal 4 – Peer Support Associate Class		
	Peer Support Associate class Peer Support Associate refresher class	2 PSA classes 30 PSA class attendees 15 certified PSAs 1 PSA refresher class 15 PSA refresher attendees 10 re-credentialed PSAs	Better off in terms of: - Quality of life - Ability to manage situations & behaviors - Stably housed - Decreased substance use - Decreased legal involvement - Increase healthy behaviors - Reduced number of days of poor health - Connected to benefit programs Participant satisfaction with service

Timeline:

June - Aug, 2026

- Agnew Beck consultation regarding implementation of outpatient behavioral services.

Sept, 2026 - Feb, 2027

- NAMI Juneau Board of Directors determines which level of billing to attain as an organization and what level of partnership to pursue with a Community Behavioral Health provider
- Agnew Beck providers support for implementation of chosen plan
- 26 support groups
- 2 meetings with support group facilitators regarding training and documentation requirements of class to make it a billable activity
- Select two additional peer-led support programs that are billable under 1115 waiver in Alaska
- Train all remaining facilitators as Peer Support Associates
- Host 1 Peer Support Associate class
- Provide ongoing individual recovery supports
- Process mini grants

Mar-Aug, 2027

- Pursue partnership with multiple Community Behavioral Health providers
- Implement required governance, policy and staffing changes to support outpatient billing efforts
- 26 support groups
- 2 meetings with support group facilitators regarding training and documentation requirements of class to make it a billable activity

- Host 1 Peer Support Associate class
- Host 1 Peer Support Associate refresher course
- Provide ongoing individual recovery supports
- Process mini grants

Sept. 2027 - Feb. 2028

- Begin providing billable outpatient behavioral health services
- Begin providing billable peer support services in partnership with another Community Behavioral Health provider

Budget Proposal

RFP	19899 Peer-Run Recovery Oriented Program
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Instructions	1. Enter the applicant name in the space provided
	2. For each year of the program, enter a cost for personnel, grant management software, and other costs for the completion of this project in the spaces provided.
	Note that the grant award will be for one year. Actual program budgets and grant award for each year are at the sole discretion of the board of trustees.
	3. Provide a narrative drescription in the proposal of what is included under Other costs.
	4. In the proposal narrative, provide a list of all other relevant agency funding received and applied for.

Applicant Name	NAMI Juneau
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Category	Year 1	Year 2
Personnel Services	\$ 85,000.00	\$ 90,000.00
Travel		
Space or Facilities Costs		
Supplies Costs	\$ 15,000.00	\$ 5,000.00
Equipment Costs		
Other costs	\$ 15,000.00	\$ 10,000.00
	\$ 115,000.00	\$ 105,000.00