

# Self Direct Sustainability Planning

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March 29, 2023

# Advantages of Self Direct Model

- Provides freedom of choice
- Self-determination about services and supports to live independently in their own home and participate in their community.
- Provides personal choice and control of support staff management:
  - Recruiting and hiring
  - Training
  - On-going management
- More of a person's annual budget directed to paying their support staff
  - Result: Higher Hourly Wage
- Easier to recruit and attract more qualified candidates
  - Result: Reduced turnover
- More support staff hours available
  - Result: Better coverage / more support

# Whether Self Direct or Not, Parent Responsibilities

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- **SSI**- reporting part time job income, managing bank account balance below required amount of \$2,000, and more.
- **Medical** – scheduling appointments, working through Medicaid processes and providers to manage:
  - Medications- management, tracking effectiveness
  - Doctor visits, including dental and vision
  - Equipment maintenance i.e., Wheelchair replacement and repair
- **Medicaid Waiver** - working with the support coordinator and developing the ISP, complying with requirements for waiver documentation, etc.
- **Supported Employment** – working with provider to maintain part time, and meaningful employment.
- **STABLE account** – managing deposits and payments for qualified needs
- **SNAP** management and renewal
- **Special Need Trust** – ensuring a plan for their son/daughter’s long-term support
- **Managing Everyday Needs** – filling caregiving gaps, shopping, maintaining an adaptive van, and much more.
- **And More.....**

# Self Direct Roles & Responsibilities

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Now add all the responsibilities of managing the self direct process...

1. **Recruiting** - managing on-line hiring sources, reaching out to CNA, OT, PT college programs, networking, etc.
2. **Interviewing** – screening resumes, conducting phone and in-person interviews (with their son/daughter)
3. **On-boarding** – working with the applicant to fill out a comprehensive list of forms and documents
4. **Training** – in-depth training based on the person’s needs. Examples bathing, grooming, toileting, feeding and daily activities. Training on Behavior Intervention Plan, behavior strategies.
5. **Scheduling** – Optimizing the waiver budget and to determine how to best meet their son/daughters needs
6. **Time Approval** – reviewing, correcting and approving time entered in the fiscal agent portal
7. **On-going Account Management** – ensuring support staff are paid correctly, managing their account balance

# Self Direct Roles & Responsibilities

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8. **Job Performance Management** – addressing issues to ensure each caregiver is meeting job expectations
9. **Complying with EVV requirements** for time keeping.
10. **Staying informed** of new policy changes in for Self Direct.
11. **Attending statewide trainings** as required.
12. **Keeping documentation** and notes on daily activities.
13. **Meetings with case manager.**
14. **Filling in** when caregivers call out.

...and most parents still choose to stay with the self-direct model due to its benefits.



# Self Direct Trends

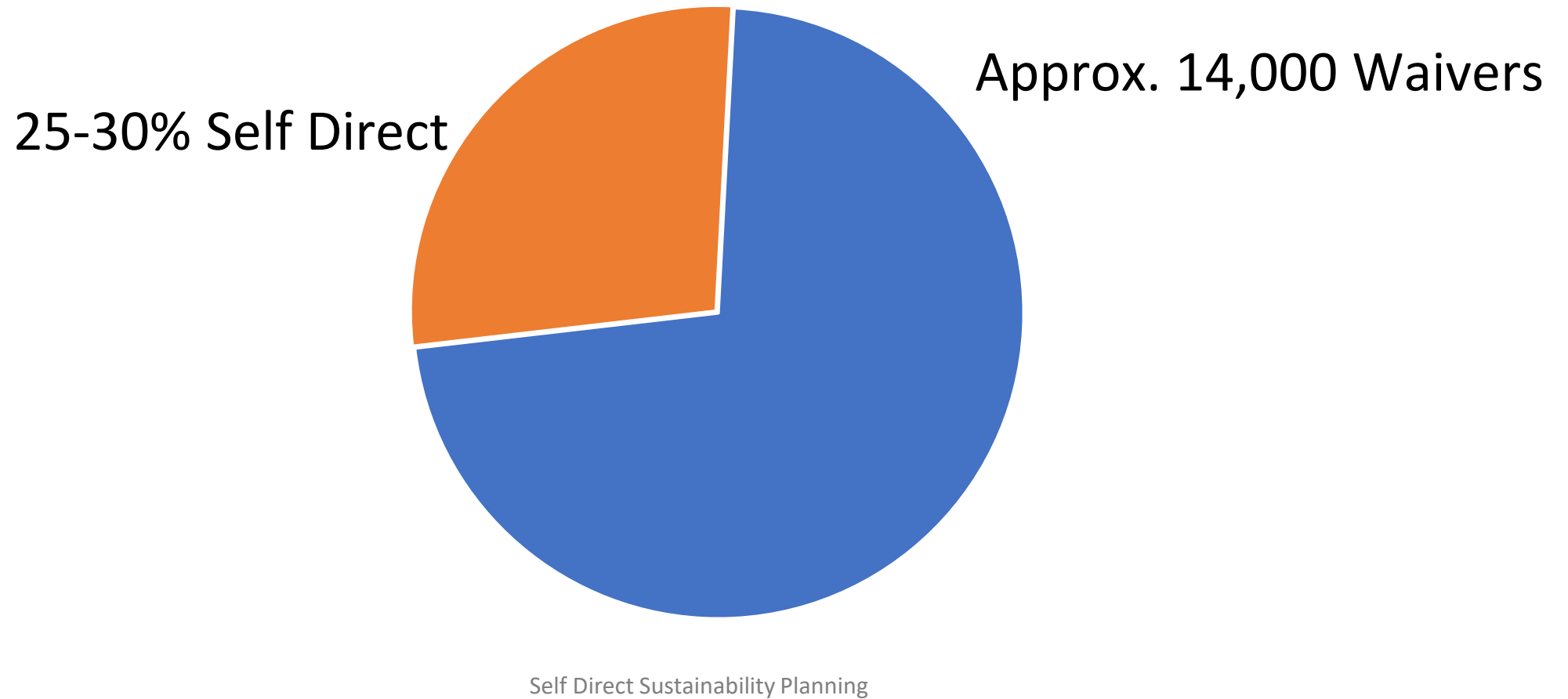
Guiding Principles are Attractive:

- Dignity and Respect
- Freedom
- Choice and Control
- Authority
- Responsibility
- Relationships
- Contributions and Community



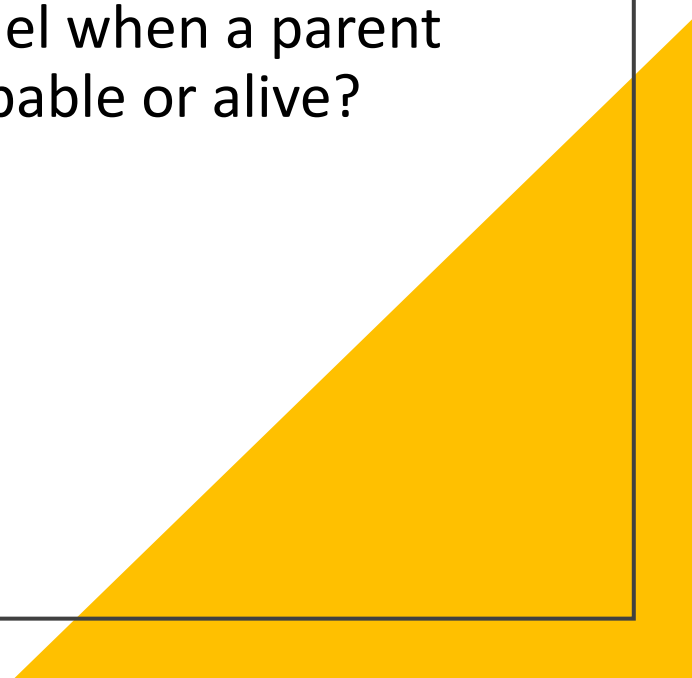
More People Are Choosing Self Direct

# I/DD Waivers in Georgia



# Emerging Challenge in Self Direct Model

What happens in the self direct caregiving model when a parent is no longer capable or alive?

A large yellow triangle is positioned in the bottom right corner of the slide, pointing upwards and to the left.



# Sustainability Planning Work Group

- 12 family members/self advocates/allies that all self direct services + 13 additional families represented from Champions Place
- Meeting- August 2022 – March 2023
- I/DD and Physical Disability Medicaid Waivers
- Pleased with the self direct model
- Project Sponsored by Champions Community Foundation
- Invited Partners and Allies

# Engaged New Partners & Allies

- Applied Self Direction
- Self Direction Advocacy Network of Maryland
- Rhode Island Self Direct Coalition
- Values Into Action\* *Support Broker Agency-* Pennsylvania, New Jersey, PA
- Human Services Research Institute
- Disability Voices United- California
- Georgia Department of Behavioral Health and Developmental Disabilities
- Georgia Department of Community Health
- Georgia Options
- Parent to Parent of Georgia
- Better Living Together

# New York State Study 2020

- Evaluation of Experiences of Self Direction in New York State: A Focus on Sustainability
- Conducted by Independent Support services- (Fiscal Agent) and Institute on Community Integration, University of Minnesota

## **The Conclusion:**

- Self-direction is excellent for individuals who have a disability as long the parent is alive and capable of administering the model.

[http://www.issny.org/wp-content/uploads/SDS\\_Self-Direction\\_NY\\_07152021.pdf](http://www.issny.org/wp-content/uploads/SDS_Self-Direction_NY_07152021.pdf)

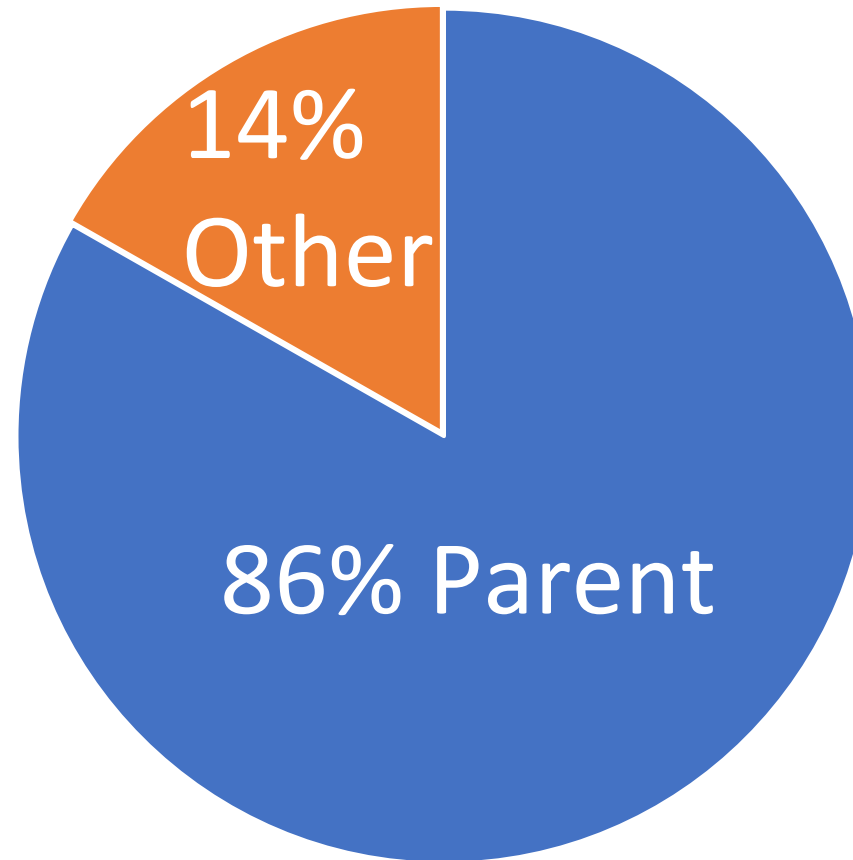
# Parent to Parent of Georgia Survey March 2023

## Who is the Employer of Record?

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300 Respondents

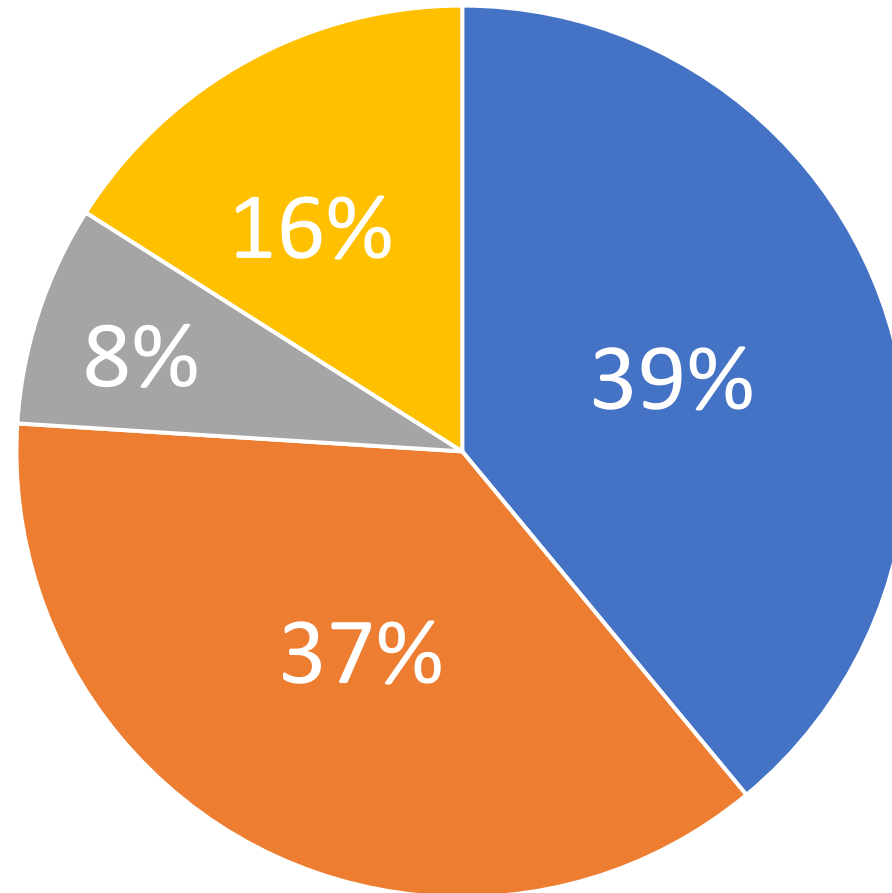
\*Parent are the majority of the administrators of the self direct model.



# Parent to Parent Survey: Ages of Employers of Record

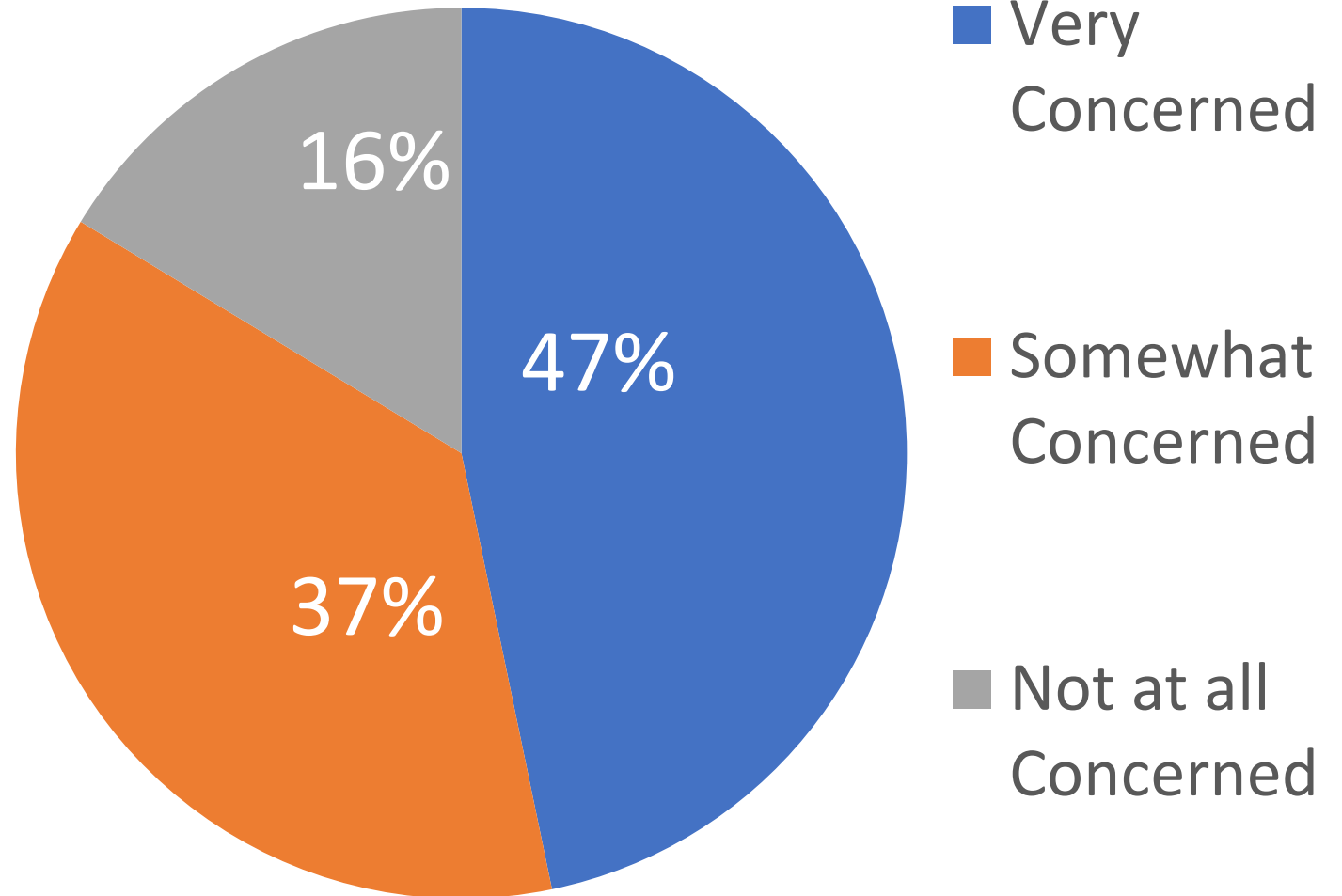
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55% of parents are over 60 years old



16% 70+ yrs.  
39% 60-69 yrs.  
37% 50-59 yrs.  
8% < 50yrs

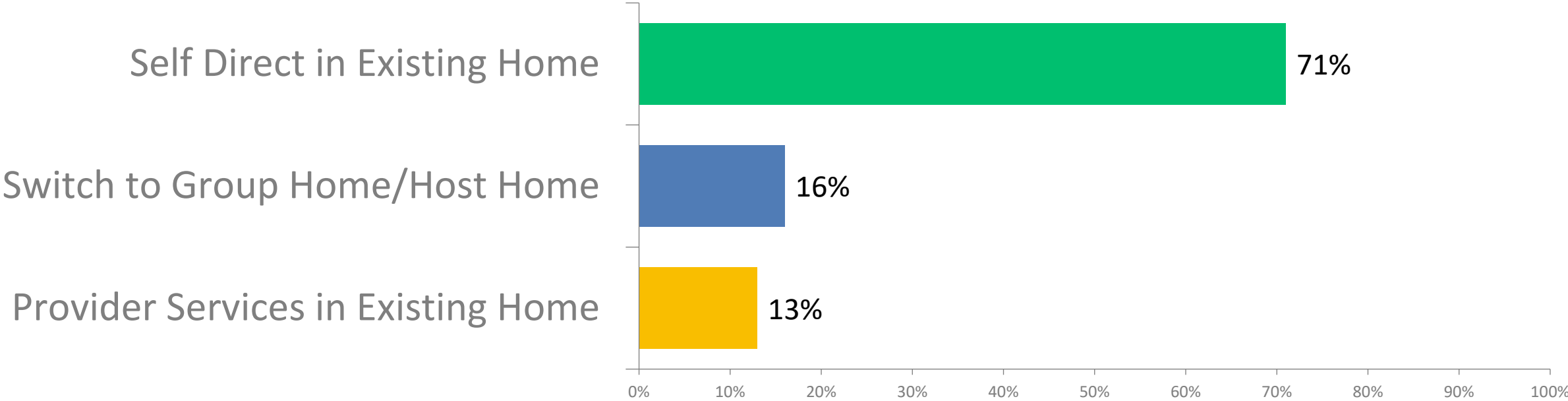
Moving forward, how concerned are you with the Self Direct option when you are no longer capable of administering it?



**84% Concerned About Sustainability**

# When you are no longer here, what are your family's wishes for your son or daughter?

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When the parents die, a  
critical role is left vacant.

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# Cost of Doing Nothing: Implications

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1

Upon a parent's death, who will manage the care?

2

When this happens, will traditional providers have the bandwidth to absorb more participants?

3

With more and more people moving towards self direct, isn't this problem going to get worse?

# Support Broker Role- Maryland- SDAN

- Assists Families/Self Advocates with the Details and Management of Services
  - Planning Process
  - Recruitment, Hiring, Scheduling, Firing of Staff
  - Budget Planning
  - Can also provide direct support if needed
- SB role may look different in different states, but essentially works cooperatively and collaboratively on behalf of the person with I/DD.
  - [https://mgaleg.maryland.gov/2022RS/Chapters\\_noln/CH\\_736\\_hb1020t.pdf](https://mgaleg.maryland.gov/2022RS/Chapters_noln/CH_736_hb1020t.pdf)

# Support Broker Draft Job Description

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The Support Broker will help the individual and caregiver with decision making on the supports and services that will be best for the individual to live successfully in the community.

The supports and services necessary will vary depending on the specific needs of the individual:

- Advocates on behalf of the individual for supports and services needed and/or wanted
- Assists in recruiting, hiring, and firing of staff
- Assists in managing the budget
- Manages supports and services
- Supervises staff (Can act as direct support staff if necessary)
- Works with staff from the Division of Developmental Disabilities (DBHDD) and the Fiscal Intermediary (FI) on budget and employment issues
- Works with Support Coordinator in developing the NOW/COMP Waiver Individual Service Plan (ISP)
- Assure Fiscal Intermediary (FI) receives required paperwork in order to pay invoices and payroll

# Sustainability Planning: Current Thinking

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For sustainability purposes, this service needs to be offered through an organization (such as a provider).

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Could this role and new service be created as an “agency light” model? Less regulated and expensive?

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This service should be offered to families with aging parents, so it is transitioned prior to their death (perhaps at age 60).

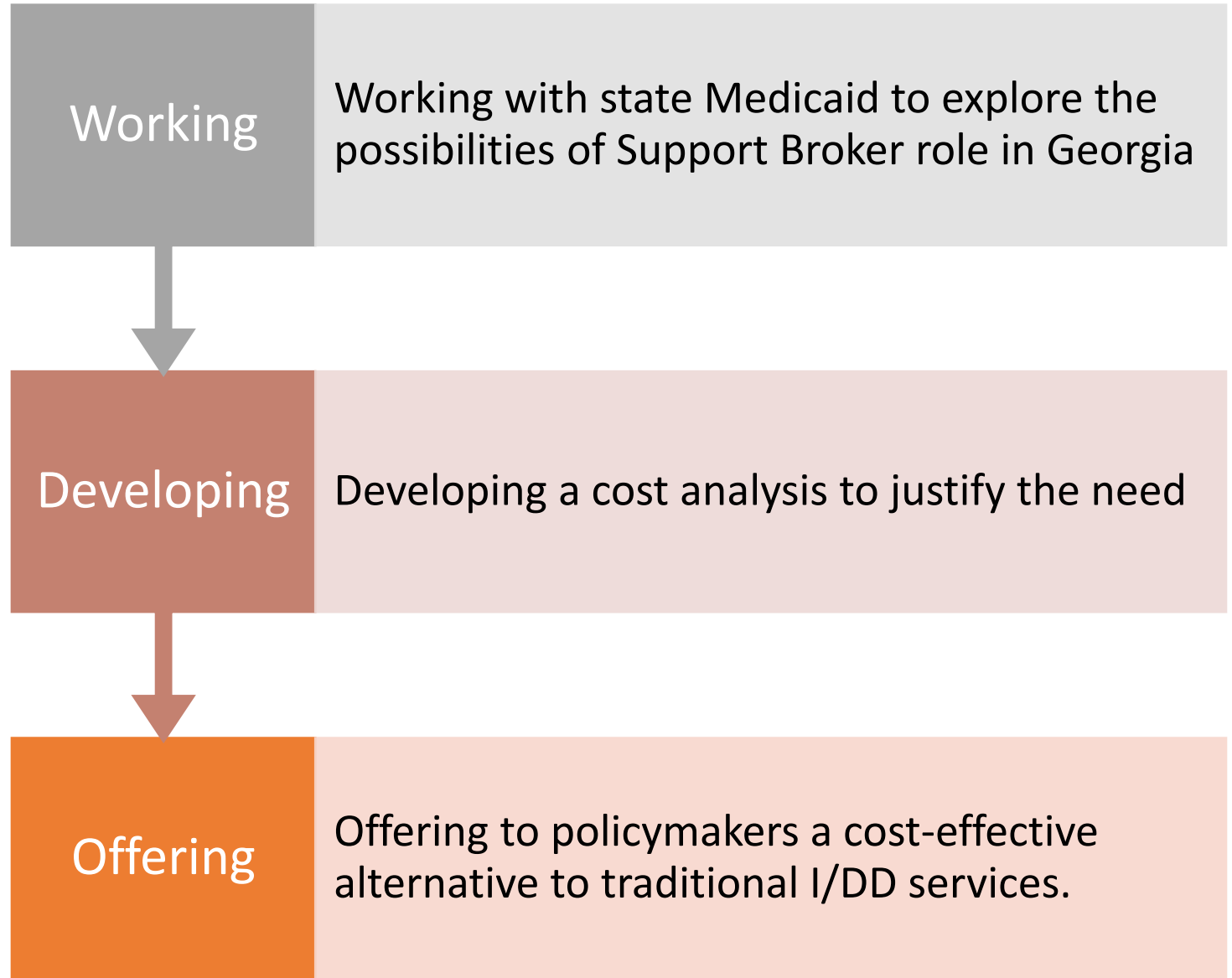
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It might also be offered to assist single parents or parents with chronic illnesses.

# Could this Evolve into a Continuum of Care Model?



# Next Steps





How is this  
Being  
Handled in  
Your State?

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Thank you!

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