

My Life... My Way



FEBRUARY 13, 2006

"...When self determined, people experience a sense of freedom to do what is interesting, personally important and vitalizing."

~Edward L. Deci and Richard M. Ryan

Vision Statement



- The vision for the “My Life...My Way” Project is that people with disabilities will determine their own future with appropriate assistance from families and friends.

Guiding Principles



Choice

Contribution & Community

Responsibilities

Fiscal Responsibility

Relationships

Control

Dreaming

Dignity & Respect

Whatever It Takes





How Did We Get Here?

- 
- Dedicated Efforts of our Project's Steering Committee
 - SDRC's Workgroup - making it happen
 - Statewide Steering Committee - Collaboration
 - Consultation from International Experts
 - Independent Service Brokers
 - Fiscal Agents (Community Interface Services)
- 



Project Steering Committee

- Self-Advocates
- Parents
- Community Members
- Service Providers
- SDRC Board Members
- Area Board XIII
- SDRC Staff


Progress Update



- 30 Participants in the Project
- Most have approved or are currently in the planning process. Several individuals are now into their 4th year of planning.
- Many individuals & families now plan independently without the use of a broker.
- Several Participants access Bill Payer and Employer of Record Services

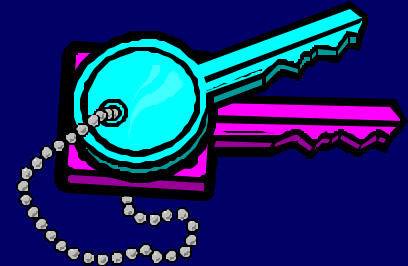


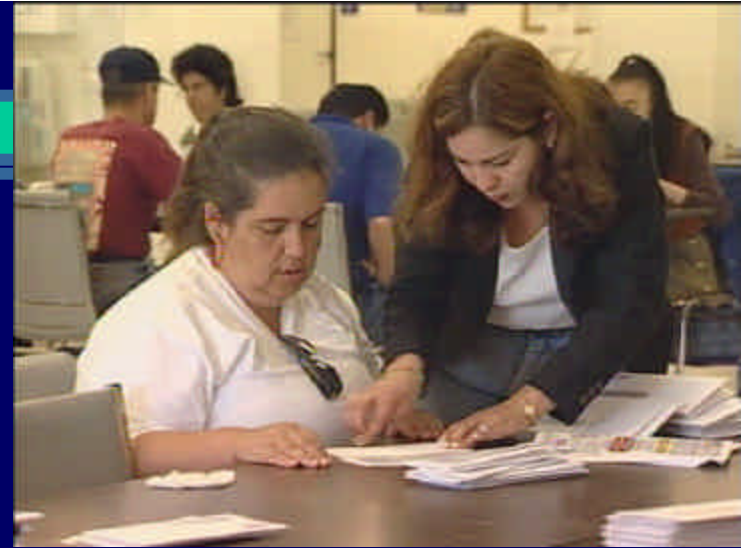
Progress Update continued. . .

- State of the Art Self Determination Library and Equipment for use by Self Advocates and Families
 - Sponsored 2 major conferences featuring national & international leaders in Self-Determination
 - Ongoing Education and Training
 - Videos developed to answer the Community's Questions
 - Waiting for the State to allow expansion of the Project—new Self-Directed Services Program (1915c, Independence Plus Waiver)
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Using Key Concepts

- Individualized Funding
- Independent Service Brokerage
- New Fiscal Options





Funding “Traditional” Services

- Vendored Providers
 - Service Categories
 - Required Standards
 - Set Rate of Payment
 - Payment in arrears
 - Limited number of providers

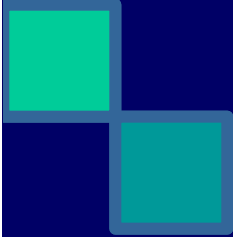



Funding Self-Directed Services

- ❖ Vendored Providers offer *customized* services
 - ✓ Required Standards of Excellence
 - ✓ Negotiated Rate of Payment
 - ✓ Payments made 'up front' & as outlined in Plan
 - ✓ Unlimited Options for Providers



Cost-Effective Strategies

- 
- Financial analysis of individualized funding and independent planning
 - Projected strategies for the long term
- 



Partners with Community



- Community Connected: Everyone Valued
- Examples of known resources in the project
- Examples of new resources accessed

Service Brokerage



- An option, not a requirement
- Choice of independent Consultants
- Trained professionals in Independent Planning
- Ongoing mentoring and networking


Service Brokerage



- Independent Planning
 - Assists in developing a service plan
 - Cost estimates services
 - Assists in accessing community resources



An Option for Planning

- Participants are given the names, biographical information and contact information of 5 independent planners who are certified to provide planning.
 - Participants screen, interview, and hire the person best suited to meet their needs.
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Request For Services




- Person with disability, family and friends meet with Service Broker (if desired) and develop a service plan
- Service plan is discussed at Planning Team meeting with SDRC Service Coordinator
- All or part of plan incorporated into an Individual Program Plan (IPP) which includes what SDRC will fund



Principles of Service Brokerage



- Conflict-free
 - No decision making authority
 - Works for the individual, and their network
 - Works at the direction and discretion of the participant
 - Available to provide a variety of services
- 

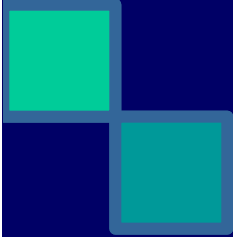

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Service Brokerage Roles

- 
- Help in identifying or clarifying goals and dreams when requested
 - Research into new resources
 - Resource development when needed
 - Negotiation with existing or new resources
 - Mediation/Conflict Resolution
 - Cost estimating potential services
 - Writing a draft plan for participant's review
 - Developing a budget of proposed services
 - Plan implementation as requested
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Current Service Brokers

- Mary Colmenares; bilingual
- Brian Newcomer
- Tamara Stark; bilingual
- Peggie Webb; ASL
- Karen Thompson; bilingual/ASL






Service Broker Training

- Service Brokers recruited
 - by recommendation of other family members or other professionals.
 - 2 full days of training- Successful Completion
 - Includes the principles, various roles, specific skills of independent planning
 - Part II training –Successful Completion
 - focused on Person Centered Planning approaches
 - Professional Liability Insurance
- 



Ongoing Mentoring and Networking



- Broker Team Meetings
 - critical element to creative options, sharing new information, and shared expertise
 - Online Discussion Group
 - Closed for confidentiality
 - Critical mechanism to sharing questions, bumps in the road, successes.
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Examples of Planning



- Identifying key generic resources for specialized needs
- Working with existing supports to uniquely craft services for the individual
- Using research and investigation to identify hidden resources
- Single Service “step –in’s” for families now planning independently.
- Accessing community using Billpayer services
- Accessing community using Employer of Record Services

Financial Management Services

- Bill Payer Services
- Employer of Record Services





Bill Payer Service – How It Works


- *After* plan is approved, obtain funds & check writing instructions from the Regional Center
- Issue check
- Provide monthly consumer account statements to stakeholders

Bill Payer Service Statement

Transaction Date	Check / JE	CIS Check Clear Date	Checks Issued or Funds Received	Amount Paid	Credits/ Receipts	Balance
02/13/03		n/a	SDRC CHECK		603.00	\$ 603.00
02/13/03	21048	2/24/2003	Rifton Equipment (adaptive utensils)	513.00		\$ 90.00
02/13/03	JE		Bill payer fee	30.00		\$ 60.00
04/30/03			Balance			\$ 60.00
05/20/03			SDRC CHECK#623535		850.00	\$ 910.00
05/20/03	21419	06/30/03	Zoological Society of SD (zoo pass)	25.00		\$ 885.00
05/20/03	21420	outstanding	Sea World (annual pass)	74.95		\$ 810.05
05/20/03	21421	outstanding	Dr. Anthony Woods (chiropractic services)	520.00		\$ 290.05
05/20/03	21422	06/03/03	Sammons-Preston (chest pad)	43.14		\$ 246.91
05/30/03	JE		Bill payer fee	34.50		\$ 212.41
06/30/03			Balance			\$ 212.41



Employer of Record Service - How It Works

- Work with broker *early in planning process*
 - Develop job description
 - Cost out proposed work schedule
 - *After Plan is approved & applicant is recruited by consumer/family*
 - Screen candidate (employment application, reference checks, interviews)
 - Make job offer only to candidate who *successfully* passes screenings
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Employer of Record Service –

How It Works (con't)

- Post-hire, pre-employment – more screenings!
- New employee processing & orientation
- Administer payroll
- Provide monthly statements to stakeholders




Employer of Record Statement

Transaction Date	Check / JE	CIS Check Clear Date	Checks Issued or Funds Received	Amount Paid	Credits/ Receipts	Balance
09/05/03	JE	n/a	Hiring fee for employee #1	280.00		\$ (280.00)
09/10/03	JE	n/a	Hiring fee for employee #2	280.00		\$ (560.00)
09/24/03		n/a	SDRC CHECK 643812		10,000.00	\$ 9,440.00
09/30/03			Balance			\$ 9,440.00
10/10/03		JE	Wages, taxes & ins. for Ee #1 & #2	338.49		\$ 9,101.51
10/24/03			Wages, taxes & ins. for Ee #1 & #2	311.94		\$ 8,789.57
10/24/03			Admission & parking fee reimb.	39.50		\$ 8,750.07
10/31/03			Mileage reimbursement- Ee #1	23.36		\$ 8,726.71
10/31/03	JE	n/a	Monthly employer of record fee - 2 Ee	70.00		\$ 8,656.71



Fiscal Services Lessons Learned




- Early communication with the team for Employer of Record Service is best
 - Late communication with the team for Bill Payer Service is best
 - Bill Payer Service is not a procurement/shopping service
 - Recruitment is difficult
 - Applicants don't always make it through the screening process
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Fiscal Services

Lessons Learned (con't)



- Team members may find Employer of Record screenings a nuisance
 - Receipts: who collect them? who is responsible for them?
 - Overworked hours; over traveled miles; unspent money due to recruitment problems
 - Social workers can't add!
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Looking to the Future

- Committed to Self Determination Principles
- Committed to Full Inclusion by all community Members
- Continued Work at local and state levels
- Continued Education and Opportunities for Individuals and Families
- Your commitment to work with us to make it happen.





PUTTING IT ALL TOGETHER



ATTRIBUTES



VALUES



INTERESTS



COMMUNITY



FAMILY



PAID SERVICES



GIFTS



FRIENDS

Questions & Feedback

