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The Support Coordination Model of Service

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The context of change

• Pace of change is increasing
• People experience greater speed and less clarity
• Less time to absorb change
• Greater need for flexibility
• Conflicting demands and information need to be navigated

Hints for effective change

• Organizations don’t change, people do
• Effective change requires cooperation and communication from all constituents
• Resistance can be minimized by dealing with the human side of things thoroughly
• Focus on people first, processes/ procedures second

How Oregon Started - The Staley Agreement

a negotiated settlement

• State Department of Human Services
• Disability Rights Oregon
• Self advocates and family members
• Oregon Council on Developmental Disabilities (OCDD)
• County Developmental Disabilities staff

Staley Implementation Group (SIG) – laying the tracks with the train coming...

• Oregon Developmental Disabilities Coalition
• Provider organizations including associations
• Brokerages (support coordination agencies)
• School district personnel (a weak area of our development)

Service Design – Self Determination and Person Centered Planning

• Self Determination movement started in Europe in the 1960’s
• People with developmental disabilities and parents seeking service control
• Grown into an international movement
Self Determination

- Person makes his or her own decisions
- Plans his or her own future
- Determines how money is spent for support
- Takes responsibility for the decisions made

Self Determination continued

- There are 4 main principles:
  1. Freedom
  2. Authority & Control
  3. Responsibility
  4. Support
- Outcomes and outcome indicators related to these principles

Typical components of an Oregon Support Coordination agency (Brokerage)

- Governing Board must have majority of clients or family members
- Unlike NJ, funding is controlled through a capped ratio of support coordinators to clients, 1 – 45

Typical components of brokerage continued

- Individual client budgets are capped and benefit levels are pre-established
- Access is through local County Developmental Disability Programs who determine eligibility
- 4 provider designations: General Business; Certified Agencies; Independent Contractors and Domestic Employees – often family members and have narrower support role; “supplanting issues”

Client enrollment and the role of the support coordinator. What does a support coordinator do?

- Eligibility and referral management by County
- Assist individuals with IDD to determine needs, plan support and develop individualized budgets based on available resources
- Assist individuals with IDD to find and arrange the resources necessary to implement planned Support Services

Support Coordinator Role continued

- Assist individuals assuring effective implementation of their plans over time, and help make adjustments to the plan or plan goals as necessary
- Provide information, education and technical assistance for individuals with DD in order to help facilitate effective plan implementation
Support Coordinator Role continued

- Ensure the plan design and implementation is free from conflict of interest within parties in the agreement
- Respectfully negotiate potential differences of opinion regarding self-direction within families
- Act as an employer agent in assisting individuals with IDD in fulfilling their roles and obligations as employers of support staff when plan calls for such arrangements

Support Coordinator Role continued

- Facilitate development and expansion of community resources; interface with provider community
- Assure and assist individuals with DD in monitoring of the quality of their support services
- With the significant changes in the system, an additional key function is to de-complicate an increasingly complicated system

It's Complicated

Support Coordinators outreach and connections to service provision

- Areas of life needs:
  - Home and household needs
  - Medical, dental, health & safety
  - Activities of daily living
  - Social and leisure
  - Communication

Support Coordinators outreach continued

- Employment and Education
- Financial
- Transportation
- Long term vision – dreams and goals
- Emergency preparedness, back up planning
Connect life areas with community supports

- Prioritize meet and greets to the unmet need areas
- Immediate need to outreach to school transition programs
- Organize a public information campaign specific to prospective support providers
- Ensure on-point messaging tailored to various groups

Connect life areas continued

- Outreach to formal and informal networks regarding the support services expansion
- Get on committees
- Expect systems to change and people need to change to cause that.
- Start projects developed around people’s interest – Superfriends!

Connect life areas continued

- Utilize the tools the customer base uses.
- Set up a sharing system – websites, Facebook page, FAQ sites.
- Prospect resources
- Meet resistance with education and opportunity

Assisting with provider changes regarding new rules and competition

- Local provider meetings to train on new system
- State association meetings as forum of problem solving and venting
- Quick communications for successes to encourage change

Provider changes continued

- Engaging the conflict openly with multiple constituents
- Outreach
- Keep customer focus

Successful transitions within the provider organizations

- The customer needs must be the starting point for new business since they are the purchaser
- Employment agency expands to Community Inclusion and budgeting support
- Local Arc program expands to Community Inclusion and budgeting support
The development of new businesses emerging models

- Local Community college went from a sheltered approach to campus wide integrated employment supports
- Pearl Buck, traditional provider expanding to job development and coaching supports
- Independent Contractor developed LLC to provide both group Community Inclusion and one-on-one supports; presently evaluating employment supports

Success built on customer service

- Significant growth in metro area of Independent Contractors
- Family initiatives created broader outreach
- Incremental changes have been most common and effective
- Customization from for-profit industry
- The challenge for providers is not achieving a single point of focus but harmonizing multiple points of focus, responding to “I want what I want”

References and reading suggestions

- http://www.strategiesformanagingchange.com/how-to-support-services/
-.http://www.ncdd.gov/publications/2011/Feb142011#toc150
- http://www.leg.state.or.us/11reg/measpdf/hb2600.dir/hb2600.intro.pdf
- http://aspe.hhs.gov/daltcp/reports/primer.htm
Here is how we are measuring outcome indicators:

1. **Access**: Data reports submitted monthly to State on enrollment categories, defining that participants have left the wait list, or via another category, have accessed brokerage services.

2. **Freedom**: The Full Access data base is the central point reporting the plans have been completed. Consistency of participant interests with actual plans are verified through an internal Client File Review and external audits by the State.

3. **Authority**: Payment for supports is authorized by client and verified through allocations and wages or fees paid per agreement.

4. **Support**: Service agreements and/or job descriptions are available for all clients who choose to have funded supports. Client specific spread sheets notate the provision of support.

5. **Responsibility**: Clients authorize payments and authorize the Fiscal Agent to pay providers for their support. This is documented via the Fiscal Agent authorization documents including the federal 2678 form.

6. **Control**: Currently Full Access clients are interviewed at least 2 times per year to get feedback on whether or not their plans are working. We complete an annual customer survey for feedback.

7. **Control**: Our clients revise their plans regularly. We have studied the number of plans and revisions, and for every plan completed there are at least two revisions. This shows that clients are empowered to make changes when they want. We also have data on the plan renewals.
References and Reading Suggestions
Prepared by Margaret Theisen

• http://www.strategies-for-managing-change.com/how-to-manage-change.html#SUBJECTS-LINK: A business perspective on change management

• http://ocdd.org/index.php/ocdd/publications/a_roadmap_to_support_services/: A Roadmap to Support Services available in English, Spanish, Vietnamese and Russian


• http://aspe.hhs.gov/daltcp/reports/primer.htm: U.S. Department of Health and Human Services - Understanding Medicaid Home and Community Services: A Primer

• http://www.leg.state.or.us/11reg/measpdf/hb2600.dir/hb2600.intro.pdf: Access to legislation that codifies the Staley Agreement