

BROKERAGE SERVICES 101

PRESENTED BY
Eastern Oregon Support Services Brokerage

2015

“Know from whence you came. If you know whence you came, there are absolutely no limitations to where you can go.”

- James Baldwin



LET'S TAKE A QUICK LOOK AT OREGON'S HISTORY OF SUPPORTING PEOPLE WITH DISABILITIES

OREGON'S HISTORY OF SUPPORTS

Fairview Training Center

Established in 1907 as “The State Institution for the Feeble Minded”

Provided a deficits-based, paternalistic, medical model of “care” offered by the State of Oregon

Closed in 2000



OREGON'S HISTORY OF SUPPORTS

Eastern Oregon State Hospital

The Eastern Oregon State Hospital opened in January 1913 after being created by a 1909 statute (Oregon Blue Book "Eastern Oregon State Hospital").

In 2007 the Eastern Oregon Psychiatric Center was renamed Blue Mountain Recovery Center and in 2009 the Eastern Oregon Training Center was closed (Oregon.gov).



OREGON'S HISTORY OF SUPPORTS

Community Living Options

Oregon began moving people into the community.

Options included large group homes, foster homes, and eventually Supported Living.

The State also begins funding day programs (both employment and non-employment related) at this time.



OREGON'S HISTORY OF SUPPORTS

Family Support Services

Services started in 1984.

These were family-focused, community-based, choice-driven services providing little funding, but with an attitude of “whatever it takes”.

The navigator staff for these programs greatly influenced the brokerage model.



OREGON'S HISTORY OF SUPPORTS

Brokerage Services

Created as a result of a lawsuit brought by individuals on long waitlists for services.

Provides choice-based, person-centered services set on helping people self-determine their lives and maintain or increase their independence.

Recognized as one of the most progressive programs in the county.

The first of fourteen brokerages opened in 2001.

The association of Support Services Brokerages, called the Oregon Support Services Association (OSSA), was formed in December 2010.



OREGON'S HISTORY OF SUPPORTS

- **OSSA VISION**

We envision a world in which all people live the life they choose in a community where they are valued, respected, and honored. In this world, individual strengths are celebrated; high quality supports are ample and readily available; labels are absent; and self determination is universal. This vision is realized from neighbor to legislator.

- **OSSA PURPOSE**

We promote, assure and protect the integrity of Support Services for Adults in Oregon by:

- Working collaboratively within the association
- Working cooperatively with our partners
- Sharing resources and best practices
- Engaging in strategic system development
- Listening and being responsive to the complex needs of our customers
- Empowering our customers, partners, and the community through education
- Listening and promoting self advocacy
- Developing resources and new services

WHAT HAS CHANGED OVER THE PAST 40 YEARS?

**Values
Attitudes
Language
Approach
Options**

WHAT WERE THESE CHANGES DRIVEN BY?

**Knowledge
Legislation
Finances
Advocacy**

THE BASICS

- What Is A Brokerage?
- Who Do Brokerages Serve?
- How Do I Enroll in Brokerage Services?
- What Services Are Available to Me?
- How Are Services Delivered?
- Where Does the Funding Come From?
- What Can I Expect in My First Year?
- What if I Have Additional Questions?

WHAT IS A SUPPORT SERVICES BROKERAGE?

- We are private organizations (mostly nonprofit public charities).
- We contract with the State of Oregon Department of Human Services to provide services and facilitate supports to adult Oregonians with I/DD.
- We offer case management supports and connect you with qualified providers and organizations to help you meet your personal goals for independence.



WHAT IS A SUPPORT SERVICES BROKERAGE? (CONT'D)

- Brokerages came into existence as a result of grassroots advocacy by individuals, families, and community advocates.
- Brokerages are primarily governed by boards comprised of people with I/DD and their families.
- There are currently 14 Brokerages statewide.
- Brokerages work with nearly 8,000 people and their families in Oregon, more than any other part of the Oregon I/DD service system.

BROKERAGE VALUES



- **Services are based on the principles of self-determination**
- **We are rooted in a strengths-based, person-centered approach**
- **We help people build real lives and real relationships**
- **We believe in engaging those served throughout system design, implementation, and evaluation**

WHO DO BROKERAGES SERVE?

We serve adults (18+) with a documented intellectual or developmental disability.

This includes, but is not limited to:

- Fetal Alcohol Effect or Fetal Alcohol Syndrome
- Down Syndrome
- Intellectual Disability
- Cerebral Palsy
- Autism

HOW DO I SIGN UP?

- First, you must be found eligible for services. Eligibility is determined by your local Community Developmental Disabilities Program (CDDP).
- Call your CDDP to request an eligibility intake (local contact info on next slide).
- Once you're found eligible, let the CDDP know you want brokerage services and they will make the referral.

HOW DO I SIGN UP?

- Mid Columbia Center for Living (**Hood River, Wasco, Sherman**): Lowell Linder, 541.296.4792
- Creative Counseling Solutions (**Gilliam, Morrow, Grant, Harney**): Dustin Wyllie, 541.575.1466
- **Umatilla** County CDDP: Mary Olsen, 541.276.0452
- Mountain Valley Mental Health (**Baker**): Lisa Wiechbrodt, 541.523.3646
- Symmetry Care (**Harney**): Chris Siegner, 541.573.8376
- Lifeways (**Malheur**): Debbie Thompson, 541.823.9003
- Center for Human Development (**Union**): Sandy Sheehy, 541.962.8800
- **Wallowa** County Center for Wellness: Jean Pekarek, 541.426.3035

ONCE ENROLLED, WHAT CAN I EXPECT?

Choice of:

- Personal Agent
- Services
- Qualified Provider(s)



WHAT DOES A PERSONAL AGENT DO?

Choice of Personal Agent (PA)

- PAs are professionals employed by Brokerages
- They assist by:
 - Offering case management supports
 - Accessing resources (providers, community programs, VR, public assistance, etc.)
 - Writing individualized support plans (ISP)
 - Providing resources to help the person meet their goals
 - Advocacy
 - Attending IEP meetings and assist in goal development

WHAT SERVICES CAN I RECEIVE?

Choice of Certain Types of Supports:

- Attendant Care
- ADL (Activities of Daily Living)/Personal Care Supports
- Relief Care
- Non-Medical Transportation
- Home Adaptations
- Chore Services
- Behavioral Supports
- Supported Employment
- More!

The specific types of supports available to you will depend on your assessed needs, and your expressed goals.

WHAT KINDS OF PROVIDERS ARE AVAILABLE?

Choice of Qualified Providers:

Customers may use brokerage funds to purchase supports from qualified providers, including:

- Personal Support Workers (people the individual directly employs)
- Independent Contractors (independent professionals who contract with the customer)
- Provider Organizations (agencies that are certified through the Licensing Unit at DHS)

HOW ARE SERVICES DELIVERED?

- Customers direct their own services to the fullest extent possible—where and when meetings occur, who is involved in planning, what is the goal of supports, etc.
- The plan says what the customer wants it to say
- All plans are created using a person-centered approach
- A formal facilitated person-centered plan is available to any customer who wants one

HOW IS THIS FUNDED?



Brokerage services are funded by a mix of state and federal money. Depending on the service, Oregon receives a different federal match. Brokerage services fall under the Title XIX Waiver (matched at the Federal Medicaid Assistance Percentage, or FMAP, rate, currently 64%), and K Plan (receives a 6% increase on the FMAP, currently 70%).

TWO FUNDING SOURCES

- The K Plan (Community First Choice Option)
- Title XIX Waiver



THE K PLAN

- Officially known as the Community First Choice Option, often referred to as the K Plan
- Part of the Affordable Care Act (sometimes referred to as “Obamacare”)
- Newly-created option for how states receive federal match dollars

THE K PLAN

- Incentivizes home and community based supports over institutions
- K Plan increases Oregon's federal match by 6%
- Oregon is the second state in the country to implement the K Plan
- Today, the vast majority of services in brokerages are funded through the K Plan

TITLE XIX WAIVER

- Federal program, funded at a lower match rate
- Unlike the K Plan, the waiver has caps on services
- Historically, most community-based services have been waiver services
- Today, the waiver covers:
 - Case Management
 - Supported Employment
 - Specialized Supplies
 - Home and Vehicle Modifications
 - Family Training

HOW ARE SERVICE LEVELS DETERMINED?

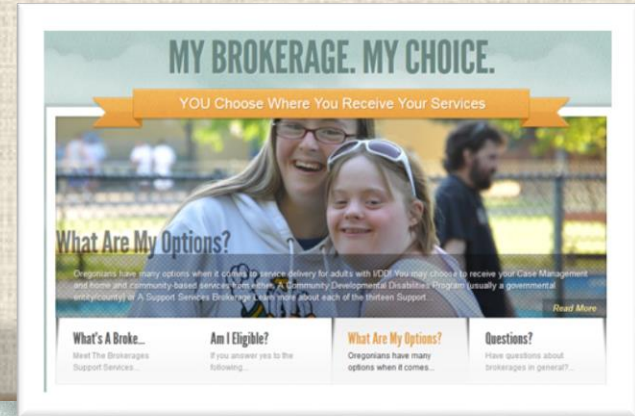
- A Functional Needs Assessment must be completed prior to writing your annual plan
- The assessment collects information about your areas and degree of need, and determines how many hours/services you can receive each plan year to meet them
- Oregon is currently using a state-created tool called the Adult Needs Assessment (ANA)

WHAT CAN I EXPECT IN MY FIRST YEAR?

- You will have a plan that spans 12 months (you may revise your plan at any time)
- We will help introduce you to community resources (paid and unpaid) to help you reach your goals
- We will connect with you as often as you like, with check-ins every few months at minimum
- We'll act as a navigator, helping you understand and make the most of Oregon's complicated service delivery system
- We'll work together to help you maintain and increase your independence in the community!

ADDITIONAL RESOURCES

- eossb.org
- mybrokeragemychoice.org
- oregonsupportservices.org



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Eastern Oregon Support Services Brokerage

Mission:

The Eastern Oregon Support Service Brokerage represents and supports people with disabilities in Eastern Oregon to achieve control over their lives and to participate in satisfying lifestyles based on the same aspirations as all citizens.

Vision:

We envision a world in which all people with disabilities are competently and consistently supported to be vital and integral members of their community, families and neighborhoods, and where communities and citizens will see

OREGON
SUPPORT SERVICES
ASSOCIATION

COMMUNITY PATHWAYS INC. CREATIVE SUPPORTS INC. EASTERN OREGON SUPPORT SERVICES BROKERAGE FULL ACCESS INCLUSION INC. INDEPENDENCE NORTHWEST
INTEGRATED SERVICES NETWORK HASTON OREGON BROKERAGE (HTR) AND (HTR-IL) RESOURCES CONNECTIONS OF OREGON
SELF DETERMINATION RESOURCES INC. SOUTHERN OREGON REGIONAL BROKERAGE UCP CONNECTIONS

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