

# BROKERAGE SERVICES 101

PRESENTED BY  
LARRY DEAL, INDEPENDENCE NORTHWEST

*"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

### 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 country.

The first of fourteen brokerages opened in 2001.



## 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 families and community advocates
- Brokerages are governed by people with I/DD and their families
- There are currently 6 metro area brokerages; 14 statewide
- Brokerages serve nearly 8,000 people and their families in Oregon, serving the largest portion of Oregonians with disabilities

## BROKERAGE VALUES



- Services are based on the principles of self-determination
- We offer 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

## OREGON'S IN-HOME SERVICE OPTIONS



## OREGON'S IN-HOME SERVICE OPTIONS

- Since 2001, Oregon has offered in-home support services to adults with intellectual and developmental disabilities.
- From 2001 – 2013, all in-home services were provided to adults by brokerages.
- From 2013 – present, in-home services are offered to adults by both brokerages and CDDPs.
- From 2013 – present, in-home services are offered to children by CDDPs.

## 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 and ask for someone in eligibility intake.
  - Multnomah: 503.988.6258
  - Washington: 503.846.4737
  - Clackamas: 503.655.8640
- Once you're found eligible, let the CDDP know you'd like brokerage services and they will make the referral.

## HOW DO I SIGN UP?

Once eligibility is completed at the county, you will receive choice advising to help you understand the options available to you for case management services.

Currently, you may opt to receive case management services from your county of residence, or any Brokerage serving your area.

Ask questions during this process, but also know that you can change your mind and request a transfer to another entity at any time.

18

## ONCE ENROLLED, WHAT CAN I EXPECT?

### Choice of:

- Brokerage
- Personal Agent
- Services
- Qualified Provider(s)

## WHAT ARE MY BROKERAGE OPTIONS?

### Choice of Brokerage

- **Community Pathways Inc. (CPI)** (M, C, W)
  - 450 Customers | Opened in 2008
- **Inclusion Inc.** (M, C)
  - 675 Customers | Opened in 2002
- **Independence Northwest** (M, C, W)
  - 500 Customers | Opened in 2007
- **Mentor Oregon** (M, C, W)
  - 675 Customers | Opened in 2002
- **SDRI (Self Determination Resources Inc.)** (W only)
  - 600 Customers | Opened in 1997
- **UCP Connections** (M, C)
  - 217 Customers | Opened 2010

M- Multnomah | C- Clackamas | W- Washington

## HOW DOES IT WORK?

- Choose your Personal Agent
- Determine your goals
- Identify your needs
- Write a plan
- Choose your provider(s)
- Change things up whenever you want

21

## HOW DOES IT WORK?

- **Choose your Personal Agent**
  - You have choice of available PA at any brokerage.
  - Think of them as a navigator who helps you connect with resources.
  - Your PA will act as your formal case manager and as an advocate.

22

## ABOUT PERSONAL AGENTS

- **Personal Agents:**
  - Provide case management supports
  - Help you access resources (providers, community programs, VR, public assistance, etc.)
  - Help you write your individualized support plans (ISP)
  - Act as an advocate
  - Attend IEP meetings and assist in goal development

## HOW DOES IT WORK?

- **Determine Your Goals**
  - What skills do you want to learn?
  - What are your short and long term goals?
  - What do we need to do together to help you achieve those goals?

24

## HOW DOES IT WORK?

- **Identify Your Needs**

- Oregon uses a needs assessment to identify disability-related needs.
- The assessment determines what services are available to you.
- The assessment is called the Adult Needs Assessment and you can find a copy on our website.

25

## HOW DOES IT WORK?

- **Write A Plan**

- We take your goals, look at available resources (paid and unpaid) and we help you write a plan.
- Plans change sometimes. The average INW customer revises his/her plan at least twice a year.

26

## HOW DOES IT WORK?

- **Choose Your Providers**

- Who would you like to have help you meet your goals?

27

## HOW DOES IT WORK?

- **Types of Providers**

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

28

## HOW DOES IT WORK?

- **Choose Your Providers**
  - We'll connect you with Personal Support Workers, independent contractors, and certified provider organizations throughout the region.
  - We'll help you interview potential matches and support you with connecting with provider organizations (tours, interviews, meetings, etc.)

29

## AVAILABLE SERVICES

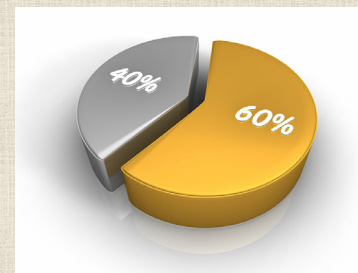
### Choice of Certain Types of Supports:

- Attendant Care
- ADL (Activities of Daily Living)/Personal Care Supports
- Relief Care
- Non-Medical Transportation
- Home Adaptations
- Chore Services
- Behavioral Supports
- Supported Employment
- See our promotional materials for a full list or go to [independencenw.org/services](http://independencenw.org/services)

## HOW ARE SERVICES DELIVERED?

- Customers direct their own services
- 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%).

32



## TWO FUNDING SOURCES FOR BROKERAGE SERVICES

- Title XIX Waiver
  - Since 2001
- Community First Choice Option (K Plan)
  - Since 2013

## TITLE XIX WAIVER

- Federal program used for most I/DD services
- Financial, benefit, and enrollment caps can occur under the waiver
- Historically, most services have been waiver services
- Today, the waiver covers:
  - Case Management
  - Supported Employment
  - Specialized Supplies
  - Home and Vehicle Modifications
  - Family Training

## THE K PLAN

- Officially known as the Community First Choice Option
- 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 fall under the K Plan

## A NOTE ABOUT SUSTAINABILITY

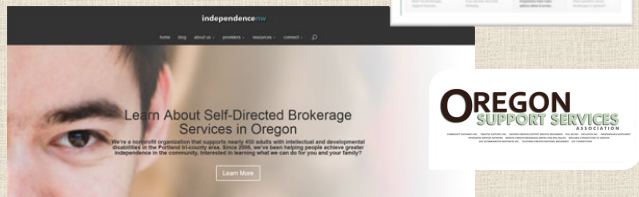
- The K Plan has greatly increased Oregon's overall spending and legislators have instructed the state to make changes to services in order to create a sustainable program into the future.
- State leadership is working with community partners, families, and people receiving services to determine a path for the future.

## 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 at least 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

- [mybrokeragemychoice.org](http://mybrokeragemychoice.org)
- [independencenw.org](http://independencenw.org)
- [oregonsupportservices.org](http://oregonsupportservices.org)



## CONTACT

### Drop us a line

[larry@independencenw.org](mailto:larry@independencenw.org)

### Give us a call

503.546.2950

### Learn more online

[independencenw.org](http://independencenw.org)

## QUESTIONS