

Massachusetts Alliance for 21st Century Disability Policy (MA21)

**Our mission is to advance full community participation
for individuals with disabilities.**

Fact Sheet on Implementing Self Direction Services

Self-Directed Services is a great opportunity to tailor public and personal resources to the goals you have in life. People with disabilities have the same rights and responsibilities that accompany 'self-determination' as everyone else. Key elements that reflect self-determination include freedom, authority, support and responsibility. Individuals should be able to plan their own lives with freely chosen friends and activities. The self-direction service model allows the person to exercise that freedom. Let's all imagine better!

Individual Budget Development:

If you receive funding If and when, you make the decision to self-direct services, support and clarification will be needed as you move forward. An important part of this approach is the budget that will guide your spending throughout the year. To help you in this specific process we've prepared this guide. The MA21 Alliance Group developed this document to help individuals (and their family or supported decision-making team) identify and advocate for a budget that adequately funds the person's self-directed services <https://www.mass.gov/dds-self-directed-services>. See endnotes for more links.

You will be planning with the Department of Developmental Services (DDS) staff at your area office. It's helpful to be prepared for the meeting and learn from others who have experienced this process before you. Maintain an attitude of "imagining better" as you work with DDS staff and others in the planning process.



Initial Preparation-Where to start:

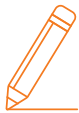
What is the person's vision?

A vision statement is a clear explanation of what a person wants to accomplish in their life. The vision can focus on health/wellness employment, friendships, spirituality, volunteerism, home and social life.

A person's vision should determine the supports and services the individual receives at home and in the community. Consider using Person Centered Planning (PCP). PCP is an ongoing process that helps people plan for their future. See Resources for PCP links.

A PCP will help you answer questions such as:

- What would a "good future" look or feel like?
 - Think about where you want to live, with whom you want to live, what you enjoy doing, what kind of job interests you, etc.
- What brings the vision to life?
 - Identify the person's strengths.
 - Develop goals. Goals are specific actions that move a person toward their vision.



Create the Action Plan

I have my vision and goals, now what?

The next step is to take the PCP and turn it into a doable plan that pulls together various facts about the individual, available public and private resources, and other areas such as transportation, geography, etc. Identify the support needs during the week and throughout the year. Keep a daily log for one week or even a month. Keep in mind different seasons of the year. It may be helpful to use categories, such as, "Home, Employment, Community, Social" and then itemize the needs under each category.

Individual- Support Needs and Implications

Needs include:

- Personal care such as basic self-care tasks, health and mental health (diet, medications, etc.)
- More complex tasks that involve organizational and critical thinking skills. (Ex: meal prep & planning, grocery shopping, banking/budget, transportation, recreation, etc.)

Individual- Support Needs and Implications (con't)

- Employment, transition to employment, volunteer or other day-time activities if not fully employed –level of independence throughout the day
- Training on how to manage staff working for you including coaching, guidance, legal and paperwork
- Transportation
- Goods or other services not affordable or available via MassHealth
 - » **Ex:** assistive technology, adaptations, etc. MassHealth benefits must always be exhausted first. (find out what is available by asking family support staff, provider agency staff, or DDS staff if one is assigned)
 - » Over the counter items available: <https://masshealthdruglist.ehs.state.ma.us/MHDL/>
- Social inclusion or employment events – fees for support staff to attend
- Additional staff training/professional development that would enhance specialized skills
- What other services are available to supplement the DDS budget? Examples include: SNAP benefits (food), MBTA Passes, scholarships, MassHealth benefits (PCA, AFC, PT/OT/Speech etc.) SSI and SSDI payments, and other income sources.

Translate information into summary documents - Get help from friends and others if needed

1. Identify the staff support needs first with a sample daily routine; use that template to build a weekly schedule of supports and goods required accounting for weekends vs. weekdays; e.g., Bill needs daily morning assistance with shower and dressing (1.5 hrs.), Fridays needs help w/banking (90 min.), etc.
2. Do the same for seasonal or intermittent support needs or goods required
3. Include space in your summary document for you to later add in costs to help you build a budget

Pricing your Support and Other Needs

- Staff Salary: Ensure adequate rate of pay for the quality level of care; take the number of hours and project a fair hourly rate
- Goods and other services: Use existing payments you are making
- Consultative support – Document services needed (remember MassHealth funded services such as Physical/Occupational Therapy and Speech Language may not be included if you have MassHealth)

Your initial plan might not be will be fully funded by DDS. Make sure you put in all the potential needs and related costs in your first round. Be reasonable but liberal in your projections. You also should have in the back of your mind what the back-up plan may be.

Public Resources, Community Resources, etc.: Identify other resources which may be available. Most will be non-cash resources but can be factored in to replace costs that you have documented next to the support needs or goods.

- Public resources such as,
 - » Housing vouchers (local and state), food stamps, MassHealth long term supports such as Personal Care Attendant (PCA), Adult foster or family care (AFC), attending day habilitation part-time, therapies such as speech, physical or occupational covered by MassHealth, etc.
 - » Factor in Support Supplemental Security Income (SSI) or Social Security Disability Income (SSDI),
 - » Other state agencies such as Mass Rehabilitation Commission, Mass Commission for the Blind, Elder Services, etc.
- Community Resources such as volunteering at the Council on Aging or helping with local community athletic programs or participating in local recreational services that may be available; connecting to local clubs which may require your support or staff support to begin the connection and activity.
- Private resources – part-time or full-time employment to help fund some of the supports needed; continued family contribution to the extent that it is reasonable and/or realistic.

Agency Costs/Fees

Agency with Choice (AWC) vs. Participant Directed Program (PDP):

AWC is a co-employment model where a provider agency helps in the staff hiring, training, payroll, etc. You will be able to have final decisions about the staff hired, but they are typically subject to certain aspects of the provider's personnel policies.

- » Shop around! Some agencies offer more co-employment services and charge the same as those agencies who do less. Ask how agencies will help you recruit staff as this is time consuming and what level of orientation they will do for new staff and what is expected of you.

PDP is a service model where the individual handles all the staff management functions and payroll details through a fiscal intermediary. A DDS Service Coordinator is assigned to support the individual.

Note: In both the AWC and PDP, Navigation services and fees should not be included in the individual's self-directed services budget (this is info-referral on services system or resources). These services should be paid separately by DDS. You or your family member should decide which approach you wish to take to implement Self-Direction. More information on the two approaches can be found in the end notes links.



Paying for Services and Negotiation with DDS Area Office

DDS funding needed - after factoring in the other resources, identify the difference needed and build that in as your full financial request to DDS. You should take your weekly plan and costs, multiply by 52 weeks and add in other costs that were intermittent or seasonal for the final figure.

When you are ready to meet with the DDS Area Office...

- Get assistance for the negotiation - Who is in your corner? (family, friends)
- Be ready to share your summary documents, especially those that show the support needs and goods required and your estimation of costs.

Once you have planned a budget with DDS and the allocation is determined, make sure you revise your plan to reflect the funding you have available.



Going Forward

- If the individual budget is inadequate, continue to advocate for what the individual needs while implementing the current budget.
- If significantly inadequate, appeal to the Area Director using your summary document.

**“As you plan, don’t hesitate
to Imagine Better”**



DDS Self-Directed Services (SD) Website

<https://www.mass.gov/dds-self-directed-services>

This page at the Department of Developmental Services (DDS) site has 3 topic areas: link to an on-line program search, overview of the "Real Lives Bill" advisory board and minutes of meetings, and resources. Resources include a guide on SD for persons with disabilities (termed self-advocates), overview of models of services and the regional DDS self-direction DDS managers contact information.



Person Centered Planning (PCP)

<https://www.lifecoursetools.com/>

<http://ddslearning.com/person-centered-practices/>

<https://futureplanning.thearc.org/pages/learn/future-planning-101>

<https://inclusive-solutions.com/person-centred-planning/>

http://deafblind.ufl.edu/files/2012/08/What_is_Person-Centered_Planning.pdf

These all are good sites to learn and develop your own person-centered plan. We recommend the life course tools -they are free. The DDS learning site has some good information topics in addition to our specific link to PCP. The Arc's future planning site provides a broader perspective. Two other helpful links are provided.



Guide on Self-Direction (SD)

<https://tinyurl.com/y42zxw9g>

Although intended for DDS staff, this site includes more information on agency with choice and participant directed programs for SD on pages 18-30



DDS Adult Waiver Guide

DDS Adult Waiver Guide <https://tinyurl.com/y4zna23l>

The list of approved goods on page 44-45. In near future, DDS will post a guide specifically on allowable expenses in self-direction.

See <https://thearc.org/position-statements/self-determination/>

MA21 is hosted at The Arc of Massachusetts. *Special thanks to Dianne Huggon, Barbara Pandolfi, Evelyn Hausslein, Anne Fracht, Sandra Jones, Theresa LaPorte, Sue Willing, Kerry Mahoney and others who participated at the MA21 meetings.*
