

# RECOMMENDATIONS FOR FUTURE DIRECTION TOWARDS CONSUMER DIRECTED SYSTEMS

## Major Recommendations

1. Continue the Individualized Budgeting program with local funding to provide a second phase of service to a larger number of individuals. This project demonstrated that flexibility with relatively small amounts of support dollars yields great benefit to the participants and the community, but the need exists to examine the effectiveness with a larger test group and over a longer implementation period. This is a wise investment of public funding.
2. Retain the flexibility of support funding, but identify what services are considered reasonable. Research is showing a link between health and other areas of quality of life (social skills and independence), supporting the emergence of holistic approaches to Medicaid benefits. This project has potential for avoiding the unintended outcomes of Medicaid, which keeps people in poverty and sustains disability, while attaining the greater goal of achieving holistic support.
3. Establish a method of determining individual needs in order to establish amounts of funding based on need. All individuals do not require the same amount of support.
4. Evaluate the outcomes of a second or transition phase. Plan for the evolution of government systems so the principles and guidelines tested in this project become part of the norm.
5. Educate personnel in the Department of Administration (DOA) and General Services Agency (GSA) in the precepts and practices of Individualized Budgeting and the need for a Fiscal Intermediary .

6. Gain commitment from DOA and GSA to this Systems Change to ensure timely release of funding to support the budgets.
7. Provide training to DISID employees on procurement processes and the preparation of purchase justifications. Consider incorporating a position within DISID to facilitate procurement and the flow of funds, particularly for grants and contracts.
8. Upgrade and add computers to the DISID office and improve the internet linkage. The office is limited in the ability to prepare and transmit documents and information efficiently, a hindrance to the employees and the public.
9. Commit \$50,000 of Vocational Rehabilitation funds for incorporation into a second Individualized Budgeting project including VR eligible participants to expedite employment outcomes. Identify this funding as applied to a model project. Evaluate its efficiency and effectiveness.
10. Commit \$10,000 of statewide independent living funds for incorporation into a second Individualized Budgeting project to expedite support for independent living outcomes. Incorporate measurement of effectiveness in an evaluation of the second phase of Individualized Budgeting.
11. Provide training for service providers (Mental Health, Public Health, Guma Mami, Catholic Social Services and others working with individuals with disabilities) to serve as “suggestors” in assisting individuals in the preparation of individualized budgets, so as not to unduly influence or make the decisions for participants.
12. Clarify the Urgent Response System’s purpose and delivery and re-assess the level of need. Educate participants fully if this component is to be used in the future.

13. Provide awareness and disseminate information to individuals with disabilities on the selection process, criteria, and components of individualized budgeting.
14. Work towards Systems Change which truly changes the systems used. Avoid replacing old bureaucracy with new bureaucracy. Always consider how to simplify and be accountable while still supporting individual outcomes.

### **Additional Recommendations**

1. Establish the cost of Fiscal Intermediary activities. Determine a fee to set up accounts and subsequent per check distribution fee for the billing of these services.
2. Consider a guideline for inquiry and discussion when establishing individual budgets in order to remove undue influence on participant choices. Ensure that guidelines for individuals on public assistance do not routinely apply to those not on public assistance.
3. Prepare for the need for third parties to engage in the purchasing of services and products on behalf of some individuals. Although the process was a challenge for some participants, collecting comparative price quotes seemed to be generally acceptable. Individuals developed a greater understanding of budgets towards the end. Be prepared to educate new participants and develop a resource data base for locating products and services. Many participants will not have good financial resources and will lack knowledge of what is available, where it is available, and at what cost. They would benefit from such organized information.
4. Simplify the process of purchasing and expending budgets by removing some of the authorization signatures. Once the individual signs authorization and it matches the budget plan, the fiscal intermediary need only process the payment and prepare a summary report for the managing project administrator. Allow for requests to be received electronically, by fax, or other similar means to reduce the need for

transportation. Simplify forms and language. Consider whether utilizing receipts to document purchases would enhance accountability without becoming cumbersome.

5. Conduct direct training for Personal Assistant usage with individuals who elect to utilize the services. Ensure that they have opportunity to engage in training on how to manage the services. Greater independence by individuals with disabilities in the hiring and management of these services relieves the time required by social workers and direct support personnel.
6. Define the target group for Personal Assistant training with wide parameters, including those who are likely to barter for services from friends and family, as they are unlikely to self identify or consider this use of assistance as a form of personal assistance.
7. Provide for the option of direct employment of personal assistants through a contract between the consumer as employer and the personal assistant as employee. Let the contract define the responsibilities and the method of paying the employee. Promote independence wherever possible.



*Participants, advisors, and the Advisory Committee at the final participant meeting.*