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Jill's Notes on Support Brokers in other States

All information collected is from PowerPoint presentations done at the Applied Self-Direction Conference and/or the state's website unless otherwise noted.

You Tube video, "A Career as a Supports Broker"

- Personal Preference Program in New Jersey
- Agency that does brokering

Supports Brokerage Service: "Roles Responsibilities and Best Practices"

- Royal Community Supports – New Jersey – **support broker agency**
- Eiros Group - New Jersey – support broker agency
- Talked about the principles of SD
- Must self-direct one service
- May assist w/tasks related to SD – recruiting, etc. managing employees, hiring process – questions to ask, policy & procedure guide, guide for individuals, how to use budgets, etc. – like owning a business (w/employees), help w/relationship w/SC and the development of their plan, help finding housing, talked about pcp, deeper dive (further conversations about issues like finding housing, etc.) planning, maintain person-centeredness, figuring out immediate and long-term needs and hooking up with resources,
 - helping with circles of support – tapping into circle members for information and help, uses the CtLC star, adding people to the circle that can help with specific wants like employment, housing, etc., circle can help brokers see people in a different way, doesn't have to be a formal circle, importance of circle, broker helps but doesn't run circle,
 - another tool is the integrated supports star - explained
 - liberty plan (said it was new)? Smaller than path or others, but gathers some of the same information
 - have policy and procedure manuals
 - Does not do: perform employer related tasks, referrals to traditional services, real estate services, SC duties, any

services other than broker services, not EOR, staffing crisis no do – is a process that takes time (so if you’re looking for someone today...)

- Coaching/navigating vs. doing, not an agency, teach and leave
- Pay = 24.36 per hour when the video was made (not sure of date) – they were working on improving the rate – can’t directly hire a support broker (interesting)
- Uses Indeed, and college boards, tear-offs, flyers to family members and person, think about their social networks,
- They have Health Plan managed care – they have health care navigators so brokers can’t help to find doc (duplication of services)
- Do detailed job descriptions from which the job ad is developed
- Broker is a waiver service
- Bogg Center, Inclusion.com

SDAN (Self-Directed Advocacy Network) – “The Role of the Support Broker” You Tube Video - Maryland

- State has two, looking for a third FMS orgs
- Supports Brokers were mandatory from 05-18, then made optional
- Brokers required when family is staff
- Is a waiver
- State has Support Broker training modules that all must do
- Support Broker: specializes in self-directed services
- I got bored...

Idaho

- Support Broker Manual sucks! All kinds of weird stuff, like having to get permission to be alone, not getting paid while the IPOS is developed, etc.
- Seems the broker has some of the responsibilities a Supports Coordinator has here.
- Here’s a list of other duties:

- Assist in facilitating the person-centered planning process as directed by the participant.
- Develop a written Support and Spending Plan (SSP) with the participant that includes the paid and unpaid supports the participant needs and wants, related risks identified with the participant's wants and preferences, and a comprehensive risk plan for each potential risk with at least three backup plans.
- Assist the participant to monitor and review their budget.
- Submit documentation regarding the participant's satisfaction with identified supports as requested by the Department.
- Participate with Department quality assurance measures, as requested.
- Assist the participant to complete the annual re-determination process as needed, including updating the support and spending plan and submitting it to the Department for authorization.
- Assist the participant, as needed, to meet the participant responsibilities and assist the participant as needed, to protect their own health and safety.
- Requirements:
 - Be 18 years of age or older
 - Have the skills and knowledge typically gained by completing college courses or community classes or workshops that count toward a degree in the human services field
 - Have at least two years verifiable experience with the target population and knowledge of services and resources in the developmental disabilities field
 - Pass the department's criminal history background check
- They have a registry that details where the broker is willing to work.

Washington State

- They have a registry done by an organization, not the state.
- Agency employs workers - co-employment model
- The rest seems really clinical.

Minnesota

- Nice, short comparison of Supports Coordinator and Support Broker responsibilities.
 - Supports Coordinator
 - Options counseling
 - Assess and identify needs
 - Initiate authorizations
 - Oversee effectiveness of IPOS
 - Monthly or quarterly contact
 - Support Broker
 - Support person to make informed choices
 - Build skills as an employer
 - Assist with budget development
 - Aide in understanding spending and utilization
 - Assist in finding, hiring, and onboarding employees
- Looks like the broker works for the FMS (GTI)?

D.C.

- GT Independence (GTI) has a manual [Portal Documents and Resources - SMW Program Participant Guide.pdf - All Documents \(sharepoint.com\)](#)
- Brokers are employed by GTI, I think?

Indiana

- Working to expand SD across five waivers
- Information and Assistance to be done by Support Broker
- One of their next steps is developing a Support Broker service definition
- From their Power Point presentation, it looks like they are a little further behind than us.
- Tedra mentioned they were going to do outreach through their CIL network.

Georgia

- Support Broker duties draft:
 - The Support Broker will help the individual and caregiver with decision making on the supports and services that will be best for the individual to live successfully in the community. Work with participants (and or guardian or family representative) on the following activities but not limited to: •
 - Recruiting: managing on-line and community recruitment sources •
 - Interviewing: screening resumes, conducting phone and in-person interviews with waiver participant •
 - On-boarding: working with the applicant to fill out the employment application accurately. •
 - Following-up with FI in a timely manner for a good-to-go start date. •
 - Training: in-depth training of direct support staff based on the person's medical and or behavioral needs. •
 - Scheduling direct support staff and community involvement
 - The Support Broker will help the individual and caregiver with decision making on the supports and services that will be best for the individual to live successfully in the community. •
 - Time Approval: reviewing, correcting, and approving time entered in the fiscal agent portal. •
 - Hold Quarterly Review Meetings: assessing staff and reviews, and changes to health and scheduling. •
 - Account Management: ensure support staff are paid correctly, managing their account balance and their fiduciary responsibility. •
 - Job Performance Management: addressing issues to ensure each caregiver is meeting job expectations •
Developing an emergency plan for backup
- They proposed annual wages of \$60,000 + benefits, with a person helping 5-7 people at 30 hours per person, with managerial oversight of 5:1, administrative overhead includes mileage, technology, etc., billed at a flat rate per month.