

Development of Support Budgets for Self-Direction

SDAB Meeting
June 7, 2023

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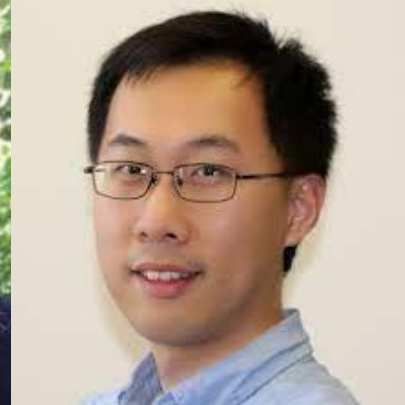
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Human Services
Research Institute

The Human Services Research Institute is a national non-profit that was founded in 1976 to improve the availability and quality of supports for children and adults with disabilities and other vulnerable populations.

We have worked for the federal government, in all 50 states, in multiple Canadian provinces, and further abroad. Underpinning our work is a simple belief:

All people and their families have the right to live, love, work, play and pursue their life aspirations in their community.

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Overview

In late 2021, the Department of Developmental Services contracted with Human Services Research Institute to:

1. Conduct a qualitative analysis of the PDP and AWC programs building on the 3-year evaluation that HSRI conducted previously
2. Analyze current assessments and budget allocations
3. Develop a budget allocation process

Themes

1. Learning about self-direction
2. Choosing self-direction
3. Managing self-direction
4. Getting support to navigate self-direction
5. Developing the budget
6. Clarifying what is allowable





Recommendations: Equitable, Transparent and Streamlined Policies

1. Consolidate of service codes
2. Move to an a la carte menu
3. Create budget transparency
4. Create menu transparency



Developing Support Budgets for Massachusetts

HSRI uses a **supports level** approach, so that...

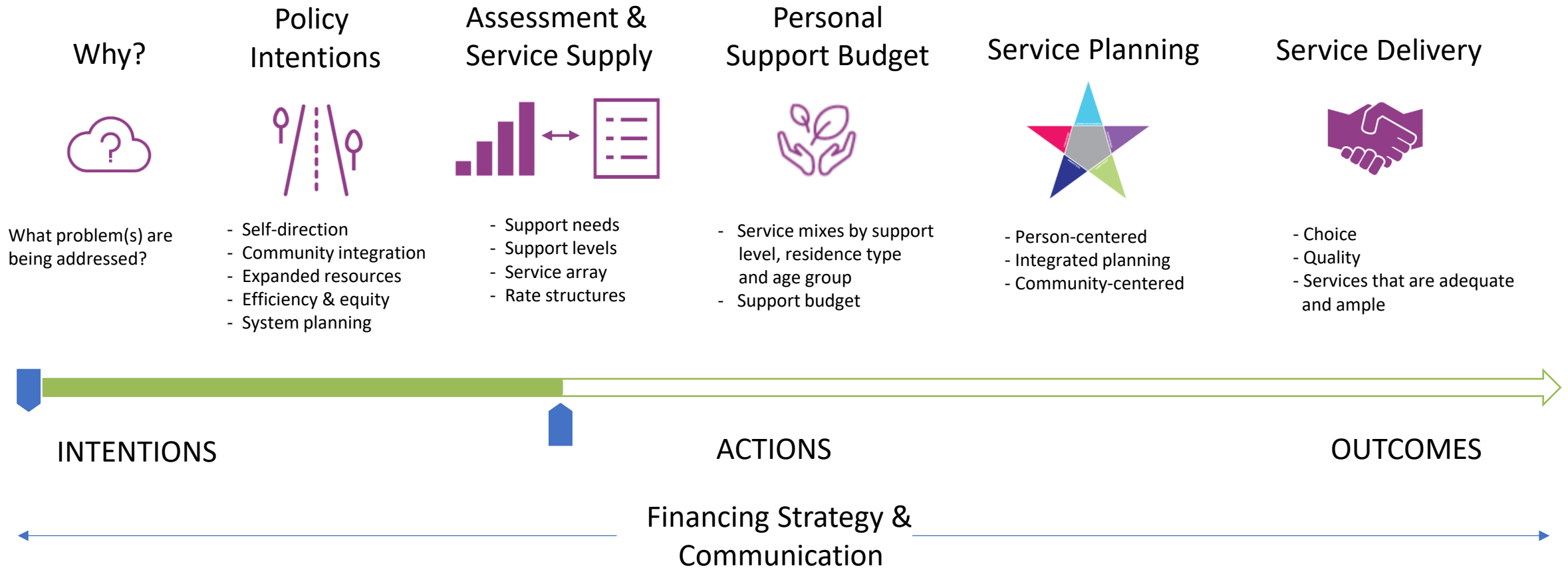
A ***supports budget*** is a targeted amount of money, or allocation that is made known to individual service recipients *before service planning* to acquire the services they need and prefer. The amount is determined by:

- ***assessing*** the extent of an individual's support needs, while accounting for their ***type of residence*** and ***age*** group. Additional factors may also be considered.
- Agreeing on the ***service mix*** – the type and amount of services – people will typically be allocated according to their assessed need, residence, and age.

An **exceptions review process** is also used to ensure that extraordinary needs are addressed.

The Supports Budgets Process

While the specific circumstances of each jurisdiction's system transformation are unique, the overarching goal of a supports budgeting process is to create a system that is efficient, fair, and person-centered.



Assessing Support Need



- Measuring support need of individuals with IDD typically refers to:
 - Assessing the need people have to complete tasks of every-day living (e.g., ADLs, IADLs)
 - Assessing needs people have resulting from medical conditions or challenging behavior
- Support need for daily activities can be quantified from low to high need within a population
- Medical and behavioral support needs may be present across the spectrum of daily support needs

Using the Supports Intensity Scale - Adult

The SIS suite of tools shift the focus from deficiencies to support needs, by evaluating the practical supports a person needs to lead an independent life. The assessment is done through an interview with the person being assessed and those who have known the individual for at least three months.

The Supports Intensity Scale (SIS-A) measures an individual's:

Exceptional Medical and Behavioral Needs: Documents extra support needed to deal with specified medical and behavioral conditions. Two sub-sections address these domains:

- A. Medical Supports Needed
- B. Behavioral Supports Needed

Support Needs for Life Activities: Documents support needs according to *frequency*, *amount*, and *type* of support needed. Seven sub-sections include:

- A. Home Living Activities
- B. Community Living Activities
- C. Lifelong Learning Activities
- D. Employment Activities
- E. Health and Safety Activities
- F. Social Activities
- G. Protection and Advocacy

Scores from these sections are aggregated to provide a composite scale score to illustrate the magnitude of individual support need but also this need relative to others.

See: <https://www.aaid.org/sis/sis-a>



Medical and behavioral support needs

During the SIS assessment, Supplemental Questions are asked that pertain to medical and behavioral support needs.

Certain responses may indicate that further review of support needs is warranted. These support needs are verified.

Verification is a record-review process where an individual or team with medical and behavioral expertise review case records to get a better understanding of the individual's needs and determine if the person's medical or behavioral support needs warrant inclusion in a specialized support level.



What about exceptions?

Everyone is unique!

The supports budgeting process may account for most people.

Yet some people will have exceptional needs and must be considered one by one.

An Exceptions Process is designed to ensure that these individuals have their needs met.



Immediate Next Steps

- Finalize the Supplemental Questions
- Submit data request for roster data, gather data
- Finalize sampling plan and select 500 participants
- Complete training for AAIDD SIS-A interviewers
- Work with DDS to ensure that interviews are completed (e.g., what to do if participant refuses interview or requests a re-assessment, verify flagged participants,)
- Gather SIS-A & SQ data from SIS-OnLine
- Submit data request for service use and spending data related to the 500 participants
- Complete analyses and build supports budgets
- Work with DDS to set plans to test the supports level framework and support mixes

