

Critical Elements and Tools to Implement Self-Determination

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Self-Determination

**How Do We Support
Individuals to Live
Self-Directed Lives in
Their Communities?**

FIRST STEP:

**Design a self-directed service
delivery system**

How is that done?



Design A System That:

Includes the
critical
elements that
support self-
determination



What are these critical elements?



Critical Elements of a Self-Directed Service System

- **Person-Centered Planning**
- **Individual Budgeting**
- **Consumer-Directed Supports**
- **Quality Assurance and Improvement**

Person-Centered Planning

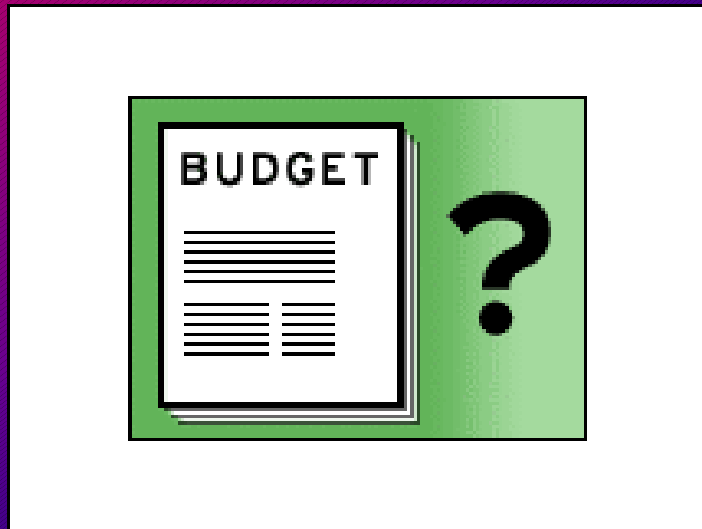


**A Philosophy
and Process for
Conducting
Planning that
Supports Self-
Determination**

Why is Person-Centered Planning Critical?

- Focuses on the individual's unique gifts, strengths, and interests
- Values the autonomy of the individual
- Helps the individual develop a vision of a preferred future
- Encourages strengthening and developing natural supports

Individual Budgeting



**Process to
establish an
individual
budget for
self-direction**

Why is Individual Budgeting critical?

- Provides an individualized resource allocation
- Uses equitable, consistent procedures
- Establishes frequency of review
- Is open for public inspection

Consumer-Directed Supports



**Supports that assist with
consumer-directed
responsibilities**

Why are Consumer-Directed Supports critical?

Assists the consumer with:

- **Support worker management**
- **Community resource identification**
- **Financial management**
- **Advocacy**

Self-Directed Quality Assurance and Improvement

Safeguards to protect the health and welfare of individuals who choose to self-direct



Why is Quality Assurance/ Quality Improvement critical?

- Puts in place protections to assure the health and safety of participants in the self-directed service delivery system
- Defines the individual and statewide emergency back-up system

Next Step After System Design



**Provide
individuals
with tools to
assist with
self-direction**

Tools of Self-Determination

- Individual Budget
- Independent Support Brokerage
- Fiscal Agent

Individual Budget

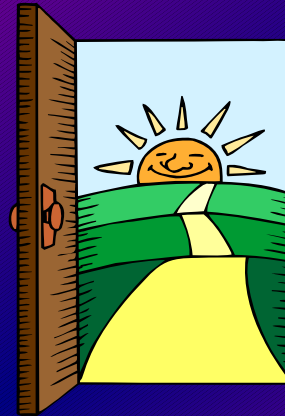
What is it?

An amount of funding allocated for services and supports for an individual and controlled by the consumer or his or her family/representative



Individual Budget

An investment in the individual's future



Comes with an obligation to use the funds wisely



And to contribute to one's community



Individual Budget

Should be
individually
created

and reflect
the distinct
ways the
individual
wants to live



Individual Budget



Individual and/or
his or her family/
representative
have authority
over personnel

All support
people work for
the individual



Individual Budget



Flexible Funding

Dollars can be moved around on the budget line items and new line items can be added if needed



Independent Support Brokerage

May help
person....

....plan

....organize
resources

...evaluate
how things are
working



Independent Support Brokerage

Independent from Service Provision

Means the support broker does not work for any of the individual's service providers

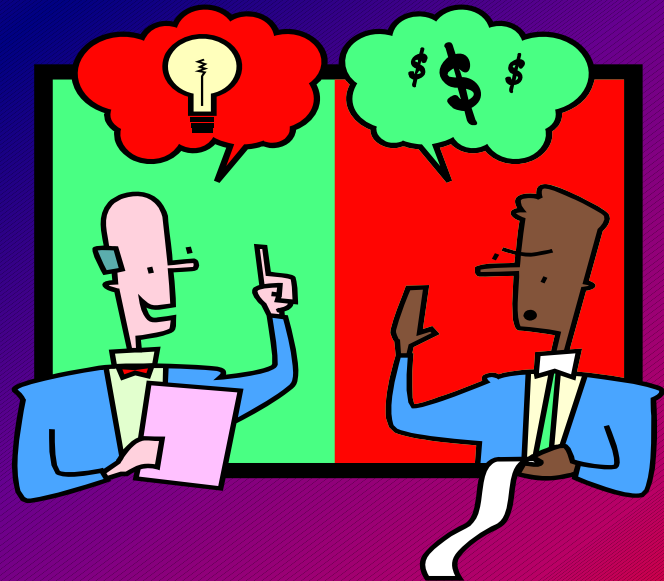


No conflict of interest or divided loyalties

Independent Support Brokerage

Independent from Public Authority

Means the support broker does not work for the funding agency

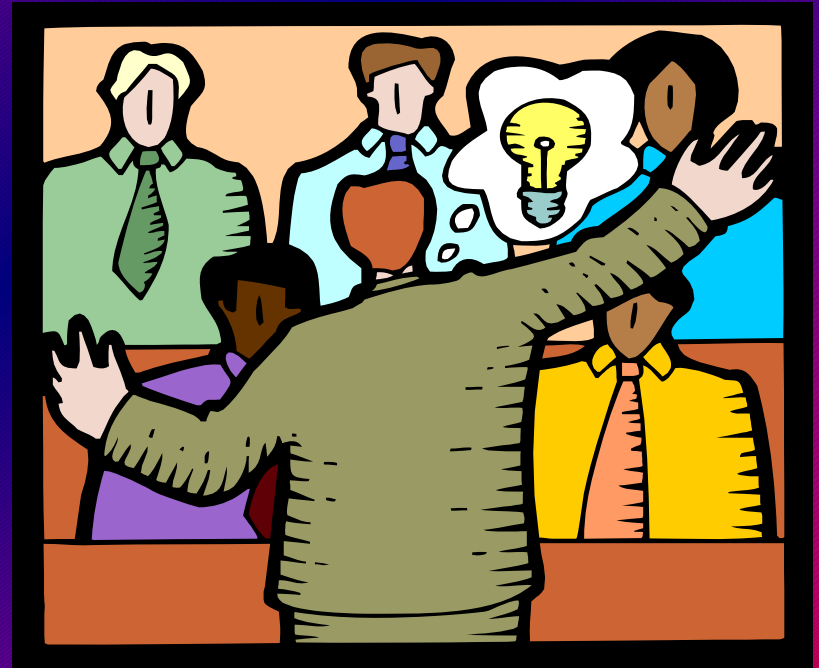


No conflict of interest or divided loyalties

Independent Support Brokerage

*Has REAL
Authority*

recognized by
the state,
county or other
public entity



Essential if they are going to
truly work for and represent
the individual

Fiscal Agent

What is it?

Place where
the funding
allocation for
the budget
gets “parked”
or banked



Fiscal Agent

A fiscal agent
can.....

write checks for
approved goods
and services

perform payroll
responsibilities

take care of tax
withholding



Fiscal Agent

The fiscal agent also...

Is accountable for
insuring
compliance with
all federal and
state laws

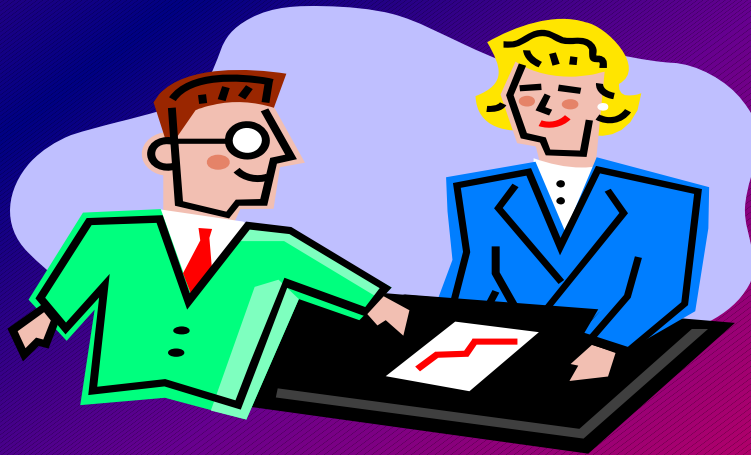
Provides financial
reports to the
individual and
funding agencies



Fiscal Agent

Freedom from Conflict of Interest

Performs no other duties that
conflict with fiscal agent role



Fiscal Agent

Provides
training and
technical
assistance to
consumers and
families/
representatives
on the fiscal
agent's services



**As with all construction,
one must have the right tools
and know how to use them to
build what you need.**



**It's the same with the
Tools of Self-Determination.**

Self-Determination

Supports Individuals in Everyday Lives

“...Living like other people in the community is not a privilege to be earned, but a right to be enjoyed, irrespective of ability and need.”

