

5th Annual

# FI/Self-Direction Summit

# Orchestrating Self-Direction



NEW YORK  
ALLIANCE FOR  
INCLUSION & INNOVATION

October 2 & 3, 2019

The Gideon Putnam, Saratoga Springs, NY

## Wednesday, October 2nd

12:00pm  
REGISTRATION

1:00pm  
WELCOME

*Ann Hardiman*, President & CEO, New York Alliance for Inclusion & Innovation

1:15-2:30pm **Panel Discussion**

### CARE COORDINATION ORGANIZATIONS

*Danielle Mazza*, Assistant VP of Care Management, Care Design NY

*Justin Mazzuca*, VP of Care Management, Tri-County Care

*Mary Beth Redmond*, Senior VP of Care Management, Life Plan

*Tracy Boff*, President & CEO, Prime Care Coordination

*Carey Peters*, Care Manager Supervisor, Southern Tier Connect

*Representative*, Advanced Care Alliance

Leadership from the Care Coordination Organizations (CCOs) will present an overview of how the CCOs and Self Direction collaborate. Discussion will focus on the challenges and successes of interfacing with Brokers and Fiscal Intermediary's, sharing of documentation, and ensuring a successful collaboration between all roles who work to support a person with a self-directed plan.

2:30-2:45pm  
BREAK

2:45-3:45pm **Panel Discussion**

### A REVIEW OF THE SURVEY PROCESS AND STANDARDS REVIEWED FOR A PROVIDER WHO PROVIDES FISCAL INTERMEDIARY SERVICES

*Robert Borchers*, Bureau of Program Certification Review of Fiscal Intermediary Services, OPWDD Division of Quality Improvement

*Brian O'Donnell*, Statewide Director, Bureau of Program Certification, OPWDD Division of Quality Improvement

3:45-4:00pm  
BREAK

4:00-5:00pm *Ignite Talks*

### SOFTWARE DEMOS

*eVero*      *Precision Care*      *Millin Associates*  
*Annkissam*      *Mains'l*

5:00-7:00pm *Networking Event in Arches*

Sponsored by *eVero*

## Thursday, October 3rd

8:00-9:00am  
BREAKFAST AND REGISTRATION

9:00-10:30am **Keynote Speaker**

*Randy Pierce*, Founder & President, 2020 Vision Quest

During two short but significant weeks in 1989, a devastating neurological disease transformed Randy Pierce from a healthy and ordinary young man to a blind man completely uncertain of his future. Randy's passion for experience encouraged him to use adversity as a positive catalyst for growth and opportunity, resulting in such amazing adventures and honors such as his earning his second-degree black belt; achieving historic hiking accomplishments in New Hampshire's White Mountains, Africa's highest peak (Mount Kilimanjaro), and Machu Picchu in the South American Andes; winning a national marathon championship and running three consecutive Boston Marathons; competing in Tough Mudder events; and being



inducted as a fan into the Pro Football Hall of Fame in Canton, Ohio.

Fast-forward to today, when Randy is the founder and President of 2020 Vision Quest, an organization that leads and inspires students and professionals to reach their peak potential.

**10:30-10:45am**

**BREAK**

## 10:45-11:45am *Concurrent Sessions*

### 1: SELF-DIRECTION: THE FI INSIDER PERSPECTIVE

**Matthew McMorris**, Director of Community Services, *The Alternative Living Group, Inc.*

**Sasha Soreff**, Business Manager, *AHRC NYC*

We will review the challenges and successes of developing a Self-Direction department from taking on your 1st case to your 200th case and the different challenges you will face throughout the process of development. We will also discuss auditing methodologies based upon your agency level of risk aversion and the necessary processes in order to maintain sustainability and profitability in Self-Direction services. We will also touch upon document management, staff training expectations, and basic billing procedures to maintain a sustainable Self-Direction program.

### 2: SUCCESS BY DESIGN: THE PITFALLS AND POSSIBILITIES WHEN CO-MANAGING EMPLOYEES IN SELF-DIRECTION

**Kimberly Corbett**, Director of Community Services, *Springbrook*

**Melisa Richardson**, Assistant Director of Community Services, *Springbrook*

**Hank Lobb**, Assistant Director of Support Brokers & Alternative Living, *Springbrook*

**Lila Balliett**, Self-Directed Services Supervisor, *Springbrook*

Employee management in a Self-Directed environment varies widely across the spectrum of options available to Fiscal Intermediaries as the Employer of Record. Whether Self-Directed services are provided in the community, non-certified situations with roommates, or Integrated Supported Housing settings, successfully managing employees is paramount to the success of a plan. Join us for a discussion around how to navigate the gray areas of employee management in a range of models for daily operations: staffing achieved with the support of Comprehensive Agency Brokerage or Independent Brokerage; independently by Representatives, or even Community Habilitation staff as on-site staff manager.

### 3: Self-Direction Does Not Have to Be a Solo Act

**Brad Pivar**, Parent Advocate, founding member of the State Wide Advocacy Network (SWAN) and Eastern NY Developmental Disabilities Advocates (ENYDDA), father of a young man receiving self-directed services

**Susan Platkin**, Mother of a young woman with IDD and bipolar disorder who has been supported by self-directed services for twelve years. A retired physician, she has been a long time advocate for school and community inclusion, and is a founding member of the New York Self-Determination Coalition.

**James Karpe**, Father of two young adults with I/DD & Founding Member of State Wide Advocacy Network (SWAN)

Orchestrating Self-Direction is difficult when a single person is filling the roles of conductor and first violin, and is also the entire rhythm section.

This dynamic session will draw upon the experience of the audience as well as the expertise of the presenters. We will have a nuanced conversation about the current state of Self-Direction for people with IDD in NYS, including: a. Examination of the gaps in the typical program, which are typically filled by the parents or by the individual receiving services. b. Presentation of practical tips on the mis-understood and under-used services that can reduce the administrative burden of running a self-direction program. c. Discussion of remaining gaps, with an eye toward identifying targets for action at the individual level, and advocacy at the system level.

### 4: FINANCIAL PATH TO INDEPENDENT HOUSING

**Carol Napierski**, Vice President of Program Development and Grant Management, *New York Alliance for Inclusion & Innovation & Co-Director of the New York Housing Resource Center*

**Melinda Burns**, Director of Adult Education, *Wildwood Programs*

This presentation will provide an overview of the steps to prepare financially to move into independent housing including; gathering financial documents, developing a basic housing budget, establishing a credit history and a good credit score.

### 5: COMPLIANCE AND OPERATIONS FOR SUCCESSFUL BILLING IN SELF-DIRECTION

**Mollie Murphy**, Co-Founder *Annkissam*

**Terrence J. Phillips, CPA**, Partner, *Healthcare/Tax-Exempt Division of The Bonadio Group*

**Bettina L. Liphardt, CPA, CIA**, Partner, *Team Leader, Healthcare/Tax-Exempt Syracuse/Utica Division, The Bonadio Group*

Self-direction is simple in concept but complex in operations. This is especially true when billing for self-direction claims. Subject matter experts from the Bonadio Group and Annkissam will present on key

requirements in self-direction and how to operate your services to not only ensure compliance, but also seamless, efficient billing. Attendees will leave with a checklist to self-assess their operational risk factors for compliance and successful billing.

**11:45-12:45pm**

**LUNCH**

## 12:45-1:45pm *Concurrent Sessions*

### 6: CDPAP AND SELF-DIRECTION

**Bryan O'Malley**, Executive Director of the Consumer Directed Personal Assistance Association of NYS (CDPAANYS)

**Hermes Fernandez**, Co-Chair, Health Care Practice Group, Bond, Schoeneck & King, PLLC

CDPAANYS is the leading expert in the State on CDPAP and remains in the midst of a campaign to save these services from drastic funding changes and programmatic overhauls. This presentation will highlight the changes to CDPAP in the final 2019-2020 state Budget and potential actions the Association will take to address cuts to the program.

### 7: WHAT IS THE FUTURE OF SELF-DIRECTION?

**Alan Kulchinsky**, Executive Director, Independent Support Services

**Michelle Giuliano**, Self-Direction Liaison Supervisor, Long Island Region, NYS OPWDD

**Susan Platkin**, Parent of a person self-directing, New York State Self Direction Board Member

**Karleen Haines**, Chief of Community and Provider Relations, Partners Health Plan

**Danielle Wiltsie**, Director of Individual, Family and Advocate Support, Care Design NY

This panel of experts will discuss the future of the Self-Directed model. We will have presenters representing the Provider Community, OPWDD, Managed Care entity, parent and service recipient. The panel will discuss the future and sustainability of the model of service given the many forces that will shape the future of the service model and do this from the perspective of the key stakeholder groups.

### 8: SELF-DIRECTION - WHY IT WORKS

**Judy Peck**, Vice President of Community Services, Allegany ARC

**Angie Dieter**, Fiscal Intermediary Coordinator, Allegany ARC

Self-autonomy leads to higher life satisfaction. Feeling powerless leads to depression, stress, and challenging behaviors. Join this presentation for a discussion around two people with complex needs receiving services that have experienced troubling situations and how self-direction assisted them in successfully navigating these experiences.

### 9: SUPPORTED DECISION-MAKING AND SELF-DIRECTION

**Desiree Loucks-Baer**, SDMNY Coordinator, New York Alliance for Inclusion & Innovation & Chief Operating Officer, National Alliance for Direct Support Professionals

Guardianship is not for everyone. Supported Decision-Making NY (SDMNY) is piloting a model of Supported Decision-Making for people with I/DD as an alternative to guardianship. Come to this session to learn more about what Supported Decision Making is, how it can work for people who are self-directing their services, and how you and the people you support can get more involved.

### 10: SELF-DIRECTION IN COLLEGE

**Nicholas Astor**, Self Advocate

**Michael Astor**, Father

**Kashif Wright, Raven Gibbons**, Support Staff

**Michele Quigley**, Executive Director, Meaningful NY

SD in college is possible but there are many lessons to be learned from Nicholas Astor's experience at SUNY Purchase. Living on Campus presents a range of challenges from accessibility to securing the perfect staff. The abundance of students on college campuses provide a willing workforce with the added advantage of integrating the student into college campus life in a way that traditional staff could not. Not only does the SD participant benefit, but the college is enriched with diversity and the staff are exposed to disability in a positive way building greater empathy and possibly new career paths. This presentation will be funny, insightful and inspiring by sharing experiences from Nicholas's first year at college.

**1:45-2:00pm**

**BREAK**

## 2:00-3:00pm *Concurrent Sessions*

### 11: THE 5 C'S OF SELF-DIRECTION

**Brittany Putnam**, Director of Independent Services, AIM Services, Inc.

**Diane Lagoumis**, Director of Self Directed Services, East End Disability Associates

**Cindy Harvey**, Associate Vice President, People, Inc.

**Casey Fallon**, Director of Client Success, eVero Corporation

This Panel representing different agency perspectives will provide insight and examples of success within the framework of the 5 C's of Self-Direction: Cash Flow, Caseload Efficiency, Compliance, Customer Service, and Collaboration. This presentation is an opportunity for seasoned FI Professionals to consider best practices in supporting the 5 C's in their organization. Panelists will discuss similarities and differences in the structure of their programs, use of software, and offer

advice on how to grow your program while still maintaining success in the 5 key areas.

## 12: SUCCESS STORIES - SELF-DIRECTION THROUGH MANAGED CARE

**Karleen Haines**, Chief of Community and Provider Relations, Partners Health Plan

**Annrose Bacani, MHA**, Provider Relations and Education Administrator, Partners Health Plan

Partners Health Plan, PHP, is the first health organization in NY created specifically to support those with I/DD. Our current plan (the FIDA-IDD) is a holistic model of care which covers all Medicaid and Medicare services as well as Care Management. Through Care Managers, waiver services are approved, in addition to Self-Direction budgets. Our presentation will give several examples of PHP members utilizing SD for their services. Stories will include barriers to success within the current system, successes they've experienced through PHP's support, and thoughts on the future of services through managed care.

## 13: TRADITIONAL VS SELF -DIRECTED SERVICES

**Letisia Comstock-Allcorn**, Self-Advocate

I would like to share my story about how self-direction changed my life. Self-direction did not just benefit me, it benefited my husband and son. Traditional services didn't work for me at all and often left me and my husband struggling. Now we are living the life of our dreams. We had to take a huge leap of faith and overcome a lot of obstacles to be the family I always knew we could be.

## 14: NEW ERA OF SELF-DIRECTION; AGENCY BROKERAGE

**Charles Jackson**, Director of Broker Services, Independent Support Services

**Minette Sherman**, Assistant Director of Broker Services, ISS

Presenters will provide a step by step system approach to successfully provide agency brokerage. From structuring and managing the department, to hiring practices, growth and sustainability, systems will be discussed, challenges and successes will be shared. Time will be allotted for questions.

## 15: SHARED LIVING THROUGH SELF-DIRECTION

**Seth Greenman**, Master Housing Navigator, New York Housing Resource Center

Dorothy said it best when she declared "there's no place like home." When we consider what it means to

have a home, the what and the where are certainly important. However, it is the who in our understanding of home that is often the make it or break it factor. This is especially true for people with intellectual and developmental disabilities since the who may move beyond friends and family to service providers, volunteers, acquaintances, or housemates. Shared living is an approach that brings the discussion of who to the forefront of person-centered planning. As such, it is an approach that works well within a framework of self-direction services where shared staffing and budget services, such as paid neighbor and live-in caregiver, can be brought together with thoughtful, intentional planning. Join us as we discuss ways that self-direction services can engage a shared living approach to support people with finding that place called home.

**3:00-3:15pm  
BREAK**

## 3:15-4:15pm *Closing Presentation*

**Chad Colarusso**, Self-Direction Statewide Coordinator, Division of Person-Centered Supports, NYS Office for People with Developmental Disabilities

Chad will conclude the conference by providing OPWDD updates, including:

- Self-Direction Status
- Participation and Demographics
- Updates from OPWDD
- FI Training
- Broker Trainings
- Centralized Broker Registration
- FAQ's