Agenda

9th Annual FI/Self-Direction Summit

Monday, October 28th

2:00 pm – 3:00 pm
CDPAP Budget Changes and Implications for Self-Direction
In this session, Roger Bearden will examine recent changes to CDAP to consolidate to a singe FI, its impact on existing FI's and on service recipients, and the legal and advocacy efforts to repeal those changes. Also, explore the potential consequences of the change for OPWDD supports. (legal/regulatory)

Roger Bearden, Bond, Schoeneck & King PLLC

3:00 pm – 3:15 pm
Break

3:15 pm – 4:00 pm
How an organized Intake process helps to educate SD COS, build confidence in FI services for SD Participant and assist in maintaining compliance.
A discussion on how an organized intake process has helped to eliminate unrealistic expectations of new and transfer participants and build confidence. Description of all steps in the process from intake interviews to launch and beyond. Finally, a discussion of barriers to the effectiveness of the process along with ideas for how to overcome issues. (innovative modes of delivery)

Kim Warga, Independent Support Services

4:00 pm – 4:15 pm
Break

4:15 pm – 5:15 pm
Streamlining Class Approvals for SD Supports: Best Practices for FI's
Join us to explore effective policies and procedures for reviewing and approving IDGS classes. Learn how to leverage your FI regional affiliations to gain regional consistency in decision making and approvals. We will discuss how we leverage software solutions to simplify the process and address common challenges. We will also provide practical strategies to overcome common challenges. (community classes)

Britney Hoosier, Aim Services
Casey Donovan, eVero

5:15 pm - 6:15 pm
Networking Event sponsored by eVero

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Tuesday, October 29th



8:00 am – 9:30 am: Welcome/Keynote

Self-reflection in self-direction: Are we stewarding the system or are we stewarding the soul?
It doesn't matter what role you play in supporting people with disabilities; your role is vital. You hold a piece of a person's story. You hold a key to a life of joy and dignity. Training and guidance for systems professionals focuses on managing costs and on goals that align with narrow guidelines meant to stay within budget. Everything from the language we use to the costs we assign is meant to take care of bottom lines. Beyond the spreadsheets, there is a person counting on the team to help them build that joy and dignity. So, are you stewarding the system or are you stewarding the soul?

Cheryl Ryan Chan, Person Centered Planning

9:30 am – 9:45 am
Break

9:45 am -10:45 am: Three Concurrent Sessions
1) Partnering with Independent Brokers
Join this panel discussion on the best practices for FI's in creating effective partnerships with independent brokers. (brokers)

Amy Dugliss, Advocates Incorporated
Kelly Hawkins, People, Inc.
Jennifer Levey, EPINY
Linda Schellenberg, Center for Family Supports

2) Diversity, Equity and Inclusion in SD
Educational presentation that covers the necessity of DEI initiatives in nonprofit organizations, SD and in quality assurance. The benefits of having dedicated DEI policies strongly outweigh the absence of these policies. Current challenges of DEI landscape include engagement, measurable strategy and available resources. The presentation covers ways to address responsibility as well as bystander observation. (DEI)

Nicole Klang, Independent Support Services

3) Supported Decision Making in a Self-Direction model
This workshop session will provide information for providers, families, and people with disabilities, about NY's groundbreaking Supported Decision-Making (SDM) Project and its natural alignment within the Self-direction model. The panel discussion will incorporate the perspective of professionals who've incorporated self-direction into their brokerage and FI services, as well as an individual who uses self-direction alongside his SDM Agreement and his active family member (and SDM Supporter). Time will be allocated for live audience questions and answers and information on how to get involved. (Self-Direction)

Naomi Brickel, Supported Decision Making NY (SDMNY)
Michele & Devon Juda
Cynthia Alcozer, ACMENY
Brittany Hoosier, AIM Services

10:45 am – 11:00 am
Break

11:00am – 12:00 pm: Three Concurrent Sessions
4) Housing Navigation Partnerships and Housing Transition
Panel presentation featuring provider agencies in different regions across New York State that have successfully built organizational capacity to offer housing navigation options to people supported. (Housing)

Seth Greenman, Avenue Green Consulting & Services, LLC
Chris Zerella, EEDA

5) Department of Labor (DOL) Workshop: A continued discussion
Self-direction gives individuals invaluable control in obtaining the supports and services they need. However, this model also presents unique legal challenges for fiscal intermediaries, who are considered joint employers of the workers self-directed individuals hire. In this session, Jack Kiley of Sheppard Mullin will discuss strategies for navigating some of the most difficult employment law challenges FIs face (FI & Self Direction).

Jack Kiley, Sheppard Mullin

6) Tech First Approach: A Powerful Tool for Independence
This session will dive into how technology can revolutionize supports. We'll look at the impact of technology from personal and organizational angles. You'll hear real-life stories, learn effective organizational strategies, and get practical tips for integrating tech into Individualized Support Plans (ISPs). If you are not thinking “tech first" you are limiting options. (Technology)

Ed Bartz, NY Alliance Consultant
John Breitenbach, Living Resources
Meghan O’Sullivan, Simply-Home

12:00 pm – 1:00 pm
Lunch

1:15 pm – 2:15 pm: Two Concurrent Sessions

7) Hiring and Supporting Self Hired Staff

Tips and tools to support families with identifying, interviewing and hiring staff, as well as systems and tools to support retention and compliance of staff once onboarded. (staffing)

Shelby Knapp, Heritage Christian Services
Bianca Jackson, Heritage Christian Services
Christina Sherry, Heritage Christian Services

8) Best Practices in Implementing the Housing ADM

The presentation will review EPI's current agency set up of the housing team and how they manage and track all the needed documents to ensure we are meeting the housing ADM. Also discuss the background of our housing navigator and how it has helped her work with landlords and other leasing agents. Finally, will discuss some of the obstacles we faced with the housing requirements and how we are working to overcome them. (Housing)

Julie Mayernik, Housing Supervisor, EPI
Krystyna Kiem, Housing Coordinator, EPI

2:15 pm – 2:30 pm
Break

2:30 pm – 3:30 pm: Closing Session
Discussion with NYS Office for People With Developmental Disabilities (OPWDD) Representatives

OPWDD Staff will discuss FI ADM, Broker ADM, state funded contracts, community classes, guidehouse eval, and sustainability.

Chad Colarusso, Self-Direction Statewide Coordinator, NYS OPWDD
Angela Czerkas, Self-Direction Statewide Coordinator, NYS OPWDD
Willow Baer, Acting Commissioner, NYS OPWDD