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Independent Living Research Utilization

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Establishing and Managing Fees-for-Service in Centers for Independent Living

Part I:
Planning for Fees-for-Service for Centers for Independent Living

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Stay True to your Mission

- Maintain integrity of core services
- Be up front with funders—advocacy is part of the package
- Include everyone in the CIL in this discussion
- Identify what you value and will not compromise
  - Consumer control/self direction
  - Positive Outcomes
  - Individual Advocacy
- Make time/create opportunities for systems advocacy
- Review/assess impact of FFS development on mission
Resource Development

CIL Standards include resource development

“No margin, no mission”

What are your CIL’s beliefs regarding—

• Increasing revenue?
• Reaching more consumers?
• Organizational growth?
• Expanding programs/services?
• Risk?
Board and Staff Buy-In

- **Depends on your CIL culture**
  - How are changes made?
  - How does information get shared?
  - Hierarchy/structure

- **Include board and staff in the entire process**
  - Brainstorming
  - Planning
  - Committees/workgroups/teams
  - Informational meetings
Board and Staff Buy-In, cont’d.

• **How are final decisions made? Be clear.**
  - Majority
  - Executive Director
  - Board
  - Management team

• **Publicize your intentions**
  - CIL newsletter/Website/social media
  - TV/radio
Know Thyself

• Use Strategic planning for FFS
  – Include all staff, board, and consumers
  – Request feedback from other key contacts
  – Get consumer input

• Utilize other resources
  – Legal and accounting for insight and advice
  – CILs that have FFS (successful and unsuccessful)
  – Talk with leaders of successful non-profits with FFS
  – Talk to for-profit leaders
Strengths

• **CIL strengths—where do you excel?**
  - Staff—trained, adaptable, and committed
  - Board—range of experience and contacts
  - Your commitment to IL philosophy
  - Awareness and responsiveness to local need
  - Consumer involvement with staff and board in planning and decision making
  - People with disabilities direct their services
  - Collect good data
  - Frugal—very low administration costs
Weaknesses

• What you don’t do well
  - Not a good partner with other agencies...philosophical snobs—think we’re better than them
  - Fail to share your passion/mission
  - Don’t participate in any professional groups
  - Missed opportunities to join community groups
  - Think that making money is bad
  - Don’t value your knowledge and expertise
  - You don’t share your success stories and great outcomes
Opportunity

• **Brainstorm Opportunities**
  - HCBS growing
  - Well trained staff available from grant that is ending
  - Lots of potential partners in our region
  - Good data and documentation
  - Understand that your CIL has great outcomes
  - A strong statewide association to offer support/mentoring
  - IL philosophy and mission are easy to share
  - The Affordable Care Act
  - Technology
  - Millennials!
Threats

• What Threats Exist?
  - Complacency
  - Losing sight of your mission*
  - Fear of failure
  - Staff resistance
  - Board resistance
  - Strong competition
  - Can’t afford to lose money
  - Time—staff already very busy. How do we do this?
Questions?
Prepare for Change

- Educate board and staff about fee-for-service options
  - How is it different?
  - Staff Requirements
  - Training opportunities
  - Infrastructure needed
  - Consumer impact
Prepare for Change, cont’d.

• Involve staff in preparations
  - Committees/workgroups
  - Quality Assurance
  - Job Descriptions
  - Space Changes
  - IT upgrades
  - Policy and procedures
  - Recruitment
Plan

• Develop Your CIL priorities
• Establish goals, objectives, activities, timelines, and who’s responsible
• Identify FFS options—contract, project/proposal based, hourly rates, etc. and process for each
• Monitor and adjust plan as needed
• Communicate regularly—Board and Staff
Plan, cont’d.

• What will success look like in each case?
  – Completion of the fee-based timeline
  – Meeting outcomes tied to a contract/agreement
  – Maintain financial stability
  – Customer satisfied with results
  – Average $$$ per month of billing within “x” months
  – Staff trained to meet funder requirements
  – Consumers experiencing positive outcomes
  – No or low turnover in staff
Who is the competition? Talk to them.

- Rate development
- Quality of services
- Staff training requirements
- What are their outcomes?
- Government requirements
- Service area
- Do they make a profit on this service?
Assess Your CIL Capacity to Embrace FFS

• Take a hard look at your CIL to assess—
  - Infrastructure
  - Direct service staff
  - Potential for recruitment
  - Level of risk*

• Ensure strong staff / board support—if things get tough
• Identify staff who are willing and capable
• Monitor services and program outcomes often
Assess Your CIL Capacity to embrace FFS, cont’d.

• **What changes are needed to make the transition?**
  - Different/unique staff skill set to provide service
  - Effective data collection system
  - More sophisticated accounting system
  - Intake procedure (new or adapted)
  - Updated policies & procedures
    - Travel, meals, overnight
    - Cancelled visits
  - Equipment—new computers/laptops
  - Added supervision
Assess Your CIL Capacity to Embrace FFS, cont’d.

- What are current barriers to make these changes happen?
  - Time
  - Limited funding
  - Staff skill set
  - Fear

- Internal assessment (tends to be more biased)
  - More in-depth planning
  - Assess utilizing checklist
  - Use expertise from board

- Consider external assessment (less biased)
  - Peer review—in depth
  - Business survey—SCORE or business volunteer
  - Your bank
  - Legal and accounting
Assess Your CIL Capacity to Embrace FFS, cont’d.

• **How to fund needed changes?**
  • Is start up money available from Customer?
  • OPM
  • Grant request to local foundation for startup
  • Review budget or plan to add in next budget cycle

• **Survey staff & board**
  • What skills do staff and board have to share?
    • Grant writing?
    • Technology expertise?
    • Connections to business community?
Determine Staffing Needs

Example: Requirements of a FFS agreement

- What skill set is needed?
  - Knowledge of resources
  - Experience living with a disability
  - Ability to relate to someone with a disability
  - Strong communication
  - Research
  - Telephone skills
  - Excellent documentation
  - Infrastructure changes—billing, reporting, transmitting
How to Determine Staffing Needs, cont’d.

• **Demand for services**
  - Funder establishes (usually) number of people eligible
  - Is there competition?
  - Try to negotiate pilot to avoid competition

• **Referral Process**
  - How purchaser makes referrals
  - Who handles a referral on your end
  - Timeline from referral to service
  - Identify internal staff who match the needs***
• Need more or different staff?
• Don’t wait until the day you start a contract.
• Develop a recruitment plan
  – Orient and train new staff
  – How long before they will be ready?
  – May need to transition staff to new positions(s)
Questions?
Preparing to Become a Vendor of Services
Identify Unmet Needs

CIL Brainstorming

• Work-related Social Security issues
• Accessibility assessments
• Home modifications
• Assistive Technology/assessments/equipment purchases
• Mental health services
  – Comprehensive Community Services
  – Quality Assurance of Mental Health Services
  – Drop-in Centers
  – Peer Run Respite
• Employment
Community Needs Surveys

• What’s been done for you already?
  – United Way
  – State Plan for Independent Living (SPIIL)
  – Universities
  – Health Consortiums
  – Political Parties
  – Newspapers

• What’s in the news? Local and statewide?
  – Lack of housing
  – Lack of transportation
  – Homelessness
  – Mental Health
Community Needs Surveys—Utilize Your Technology

CIL website
- Solicit feedback
- Utilize social media
- Survey Monkey
  - Easy
  - Cost effective
  - Can go to anyone with computer
  - You can make the survey yours
  - Find out who knows you and who doesn’t
Community Needs Surveys—Use Community Resources

- Use Community Resources to assist with survey
  - Class/student intern project
  - Universities/extensions
  - SCORE/retired business association
- Use survey to share CIL information and stories
- Issue a press release to increase response
- Ask if respondent knows about your center
Create or Expand Community Relationships

• **Who knows what about your CIL?**
  - Survey
  - Focus groups

• **Identify opportunities to get involved and be more visible**

• **Encourage and support staff/ board to participate in—**
  - Committees
  - Workgroups
  - Advisory Councils
  - Speaking opportunities
  - Training opportunities
Create or Expand Community Relationships, cont’d.

- Develop a plan to close gap of who needs to know and understand your CIL
- Evaluate your marketing strategies
  - What efforts do you make?
  - Are your efforts successful?
- What are untapped resources?
  - Radio talk show
  - Newspapers
- What does your website do for you?
  - Is it current?
  - Is it informative?
Know Your Service Area

- **Identify potential partners**
  - Like-minded philosophy
  - Common interest
  - Shared space/staff
  - A reputation of results and positive outcomes
  - They do something you value or want
  - Disability-related service provider
Identify Potential FFS Opportunities

- Division of Vocational Rehabilitation
- Government Human Services—Adults, children, and other
- Medicaid (MA)
- Managed Care Organizations
- Insurance companies
- Businesses
- Municipalities—School systems
- Other Governmental Departments—Education, DECD, Housing, Transportation
- Other disability-based organizations
Getting to the Contract

• **Determine what the purchaser needs and values**
  - Quality service
  - Positive outcomes
  - Cost effectiveness ***
  - Strong relationships with providers
  - Consumer satisfaction
  - Accurate and timely documentation
  - Communication
  - No problems
Getting to the Contract, cont’d.

• **Identify how your product is compatible**
  - Consider what purchaser values
  - What your CIL does well now
  - Only promise what you can deliver (vaporware)
  - Be consistent and persistent

• **Highlight what your CIL values—brag**
  - CIL agency presentation—in your “house”
  - Share consumer stories to highlight outcomes
  - If available do comparison with competition
Getting to the Contract, cont’d. 2

• **Use CIL events to build relationships with purchaser**
  - As a guest speaker at board meeting
  - Newsletter articles
  - Social events
  - Cross training of staff

• **Nurture your relationships with funders/buyers**

• **“It’s all about relationships!”** *Kym King*
Barriers and Solutions

• **Vendor/ Purchaser is difficult**
  • You may need to change who deals with them
  • Maintain high level of communication

• **Vendor doesn’t want to pay what it costs to provide the service**
  • Provide specifics—break it into pieces
  • Suggest a trial period for both parties
  • Try to tie cost into what vendor values

• **Difference in values/ philosophy**
  • How much difference can you tolerate?
Barriers & Solutions, cont’d.

• **Purchaser requirements too difficult**
  • Be prepared to say “no”
  • Negotiate

• **Too much competition**
  • Evaluate if its worth the effort
  • Partner or subcontract with a competitor

• **Need start up funds**
  • Investigate a business loan
  • OPM
  • Write start up grant(s)
  • Dip into your fund balance if project is a sure thing
Questions?
Wrap Up, Evaluation, and Contact Information

Please *click the link below* to complete your evaluation of this program:


Contact:
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