

# Brokerage Services 101



a presentation by **independence**  
**nw**

*"You have to know the past to  
understand the present."*

- Carl Sagan



OREGON'S CHANGING SOCIAL CONTRACT

1907 –  
Early 1980s

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2018 – the  
future

- Decisions being made now at the state and federal level will determine the future structure of disability services in Oregon and throughout the country.

## WHAT HAS CHANGED OVER THE PAST 40 YEARS?

Values  
Attitudes  
Language  
Approach  
Options

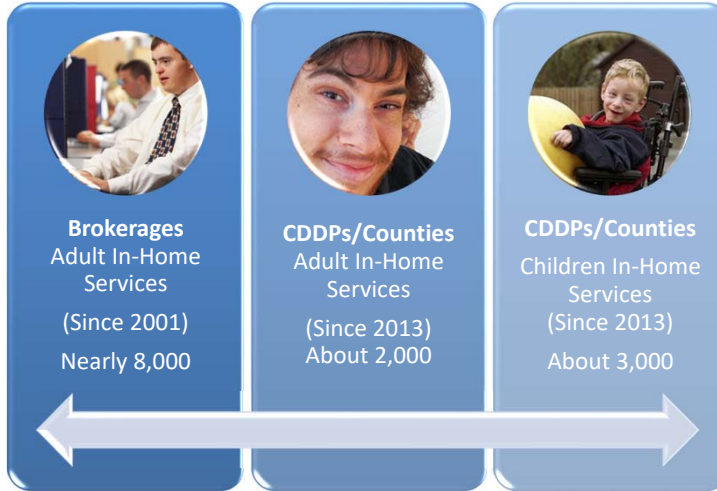
## **WHAT WERE THESE CHANGES DRIVEN BY?**

**Knowledge  
Legislation  
Finances  
Advocacy**

## **THE BASICS**

- How is the DD System Designed?
- What Is a Brokerage?
- Who Do Brokerages Serve?
- How Do I Enroll in Brokerage Services?
- What Is Oregon's Service Structure?
- What Services Are Available to Me?
- How Are Services Delivered?
- Where Does the Funding Come From?
- What Can I Expect in My First Year?
- What if I Have Additional Questions?

## UNDERSTANDING OREGON'S SYSTEM DESIGN



## WHAT IS A SUPPORT SERVICES BROKERAGE?

- We are private organizations (mostly nonprofit public charities)
- We contract with the State of Oregon Department of Human Services to provide services and facilitate supports to adult Oregonians with I/DD
- We offer case management supports and connect you with qualified providers and organizations to help you meet your personal goals for independence.



## WHAT IS A SUPPORT SERVICES BROKERAGE? (CONT'D)

- Brokerages came into existence as a result of grassroots advocacy by families and community advocates
- Brokerages are governed by people with I/DD and their families
- There are currently 6 metro area brokerages; 14 statewide
- Brokerages serve nearly 8,000 people and their families in Oregon, serving the largest portion of Oregonians with disabilities

## BROKERAGE VALUES



- Services are based on the principles of self-determination
- We offer a strengths-based, person-centered approach
- We help people build real lives and real relationships
- We believe in engaging those served throughout system design, implementation, and evaluation

## WHO DO BROKERAGES SERVE?

We serve adults (18+) with a documented intellectual or developmental disability.

This includes, but is not limited to:

- Fetal Alcohol Effect or Fetal Alcohol Syndrome
- Down Syndrome
- Intellectual Disability
- Cerebral Palsy
- Autism

## HOW DO I SIGN UP?

- First, you must be found eligible for services. Eligibility is determined by your local Community Developmental Disabilities Program (CDDP)
- Call your CDDP and ask for someone in eligibility intake.
- Once you're found eligible, let the CDDP know you'd like brokerage services and they will make the referral.



## HOW DO I SIGN UP?

Once eligibility is completed at the county, you will receive choice advising to help you understand the options available to you for case management services.

Currently, you may opt to receive case management services from your county of residence, or any Brokerage serving your area.

Ask questions during this process, but also know that you can change your mind and request a transfer to another entity at any time.

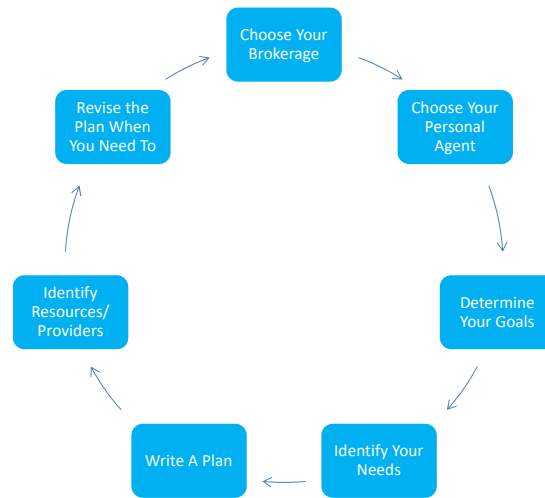
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## ONCE ENROLLED, WHAT CAN I EXPECT?

### Choice of:

- Brokerage
- Personal Agent
- Services
- Qualified Provider(s)

# HOW DOES IT WORK?



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# FIND A BROKERAGE

- Check out all fourteen brokerages online at [www.mybrokeragechoice.org](http://www.mybrokeragechoice.org)



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## PERSONAL AGENTS

- **Choose your Personal Agent**
  - You have choice of available PA at any brokerage.
  - Think of them as a navigator who helps you connect with resources.
  - Your PA will act as your formal case manager and as an advocate.

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## PERSONAL AGENTS

- Provide case management supports
- Help you access resources (providers, community programs, Vocational Rehabilitation, public assistance, etc.)
- Help you write your individualized support plans (ISP)
- Act as an advocate in a variety of settings
- Attend IEP meetings and assist in goal development
- Support you with working with paid providers

## YOUR GOALS, YOUR LIFE

- **Determine Your Goals**
  - What skills do you want to learn?
  - What are your short and long term goals?
  - What do we need to do together to help you achieve those goals?

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## YOUR SUPPORTS

- **Identify Your Needs**
  - Oregon uses a needs assessment to identify disability-related needs.
  - The assessment determines what services are available to you.
  - The assessment is called the Adult Needs Assessment and you can find a copy on our website.

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## YOUR PLAN

- **Write A Plan**
  - We take your goals, look at available resources (paid and unpaid) and we help you write a plan.
  - Plans change sometimes. The average INW customer revises his/her plan at least twice a year.

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## YOUR PROVIDERS, YOUR CHOICE

- **Choose Your Providers**
  - Who would you like to have help you meet your goals?

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## YOUR PROVIDERS, YOUR CHOICE

- **Types of Providers**
  - Personal Support Workers (people you actually employ)
  - Independent Contractors (professionals who contract directly with the customer)
  - Provider Organizations (agencies that are certified through the Licensing Unit at DHS)

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## YOUR PROVIDERS, YOUR CHOICE

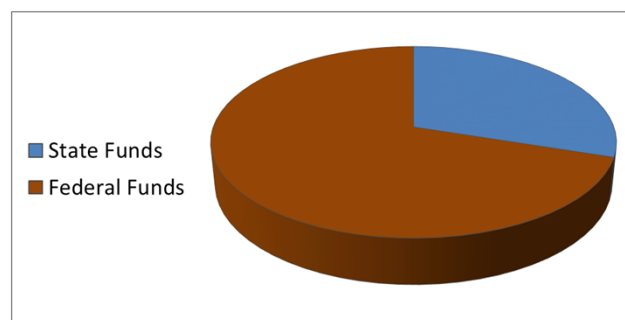
- **Choose Your Providers**
  - We'll connect you with Personal Support Workers, independent contractors, and certified provider organizations throughout the region.
  - We'll help you interview potential matches and support you with connecting with provider organizations (tours, interviews, meetings, etc.)

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## AVAILABLE SERVICES

- Case Management/Resource and Referral
- Person-Centered Planning
- Advocacy
- Assistive Devices and Assistive Technology
- Attendant Care/Personal Care Supports
- Respite Care
- Non-Medical Transportation
- Home and Vehicle Modifications
- Chore Services
- Behavioral Supports
- Supported Employment
- See our promotional materials for a full list or go to [independencenw.org/services](http://independencenw.org/services)

## HOW IS THIS FUNDED?



Brokerage services are funded by a mix of state and federal money. Depending on the service, Oregon receives a different federal match.

## WHAT CAN I EXPECT IN MY FIRST YEAR?

- You will have a plan that spans 12 months (you may revise your plan at any time)
- We will help introduce you to community resources (paid and unpaid) to help you reach your goals
- We will connect with you as often as you like, with check ins at least every few months at minimum
- We'll act as a navigator, helping you understand and make the most of Oregon's complicated service delivery system
- We'll work together to help you maintain and increase your independence in the community!

## ADDITIONAL RESOURCES

- [mybrokeragemychoice.org](http://mybrokeragemychoice.org)
- [independencenw.org](http://independencenw.org)
- [oregonsupportservices.org](http://oregonsupportservices.org)





# CONTACT

## Drop us a line

Audrey Boyes ([aboyes@goisn.org](mailto:aboyes@goisn.org))

Larry Deal ([larry.deal@independencenw.org](mailto:larry.deal@independencenw.org))

## Give us a call

503.856.7040 (Audrey)

503.546.2950 (Larry)

## Learn more online

[goisn.org](http://goisn.org)

[independencenw.org](http://independencenw.org)

[mybrokeragemychoice.org](http://mybrokeragemychoice.org)

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# QUESTIONS?

