

# case study:

## Financial Management Services for a State Program in Massachusetts



- PPL developed the Extranet, a budget authorization Web Portal which provided service coordinators with the flexibility to revise budgets to meet the changing needs of consumers in the ISO.
- PPL worked with participants and designated agency staff members to determine the nature, extent, and availability of services and supports sought by the individual and to identify appropriate choices to meet needs consistent with each participant's individual support plan and a consumer-directed approach.
- PPL assisted in the implementation of participants' support plans by serving as fiscal intermediary, providing financial monitoring, billing, payment and reporting, support worker recruitment and credentialing, quality assurance, information systems development, and management.

### THE CLIENT

The Commonwealth of Massachusetts Department of Developmental Services (DDS)

### THE PROJECT

Development of a participant direction pilot program for adults with developmental disabilities.

### THE OPPORTUNITY

While working with the Robert Wood Johnson Foundation and the Center for Self-Determination, PCG Public Partnerships, LLC (PPL) was tasked to create the "Owner's Manual for Self-Determination." The development of this manual initiated a pilot project – Intermediary Service Organization (ISO) – that began in the metro-Boston region of Massachusetts in 1999. The region had many complex cases that required the Department to look for an alternative to traditional vendors for services which were not being delivered. The ISO program emphasized local responsibility, offering individuals and DDS service coordinators significant flexibility and responsibility in managing resources.

### THE PPL APPROACH

PPL took a number of steps to launch the pilot program:

- PPL worked with highly motivated and committed service coordinators, who lent their experience in precisely crafting service models and negotiated rates, which ultimately led to an overall improved experience for consumers.
- PPL created a program advisory committee including pilot program users and family members, program service coordinators, Val Bradley (President of Human Services Research Institute), and Marty Wyngaarden-Krauss (Dean of the Heller School for Social Policy and Management, Brandeis, University).

### THE RESULT

The initial metro-Boston pilot program expanded statewide in 2003 to serve several hundred participants. In 2010, DDS and PPL worked together to develop a participant-directed program that supported three new Home and Community Based Waivers. In July 2010, the ISO transitioned into the Participant Directed Program (PDP) to allow individuals to direct their services through a combination of waiver and state funded services. Accomplishments from this project include

- Greater self determination for individuals with developmental disabilities.
- Development of new support services, customized supports, and innovative approaches to using community resources; up to 60 types of services, supports, and goods are part of the program.
- More efficient management of public funds and resources.
- In 2008, DDS implemented a new waiver focused on children with autism and their families. PPL worked with the state to design and launch the program, which focused on supporting children who demonstrate significant deficits in the areas of behavioral, social, and communication skills as a result of their autism.
- Development of a directory of credentialed providers throughout the state for use by support brokers and families in the autism program.