HOME & COMMUNITY-BASED SERVICES
BROKERAGE DESIGN GUIDE

A ROAD MAP FOR ESTABLISHING A BROKERAGE FOR HOME AND COMMUNITY-BASED SERVICES

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CALL CENTER/ADRC

Independence
RSVP, Veterans Health Promotion
Info & Assistance
Outreach & Education
Senior Dining
& Home-Delivery
Care Mgmt
Adult Day Care
Caregiver Support
Care Transitions
IHSS

Dependence
APS
Ombudsman
Project Care
PA/PG/PC
Senior Team
INTERGENERATIONAL
FRAGMENTED SYSTEM OF CARE
COORDINATED, PERSON-CENTERED SYSTEM OF CARE
Began 1999

Today over 800 stakeholders

Established mission, vision, goals

Three strategies
A partnership between HHSA/AIS and Palomar Health, Scripps Health, Sharp HealthCare and UC San Diego Health System (13 hospitals)
AIS provides critical social support services through referral or direct provision to reduce the risk of a readmission.
Medi-Cal Managed Long-Term Services and Supports (LTSS)
- **What:** Mandatory enrollment into a Medi-Cal health plan for all Medi-Cal benefits, including LTSS and Medicare wrap-around benefits.
- **Who:** About 64,000 Medi-Cal beneficiaries, including dual eligibles.

Cal MediConnect (Duals Demonstration)
- **What:** Optional enrollment into 3-year demo program for coordinated Medicare and Medi-Cal benefits through single delivery system.
- **Who:** About 56,000 dual eligibles in San Diego.
COORDINATED CARE INITIATIVE (CCI)

LONG TERM SERVICES & SUPPORTS

In-Home Supportive Services (IHSS)

Multi-purpose Senior Services Program (MSSP)

Community-Based Adult Services

Nursing Home Care
THE COUNTY’S ROLE

**In-Home Supportive Services (IHSS) - 25,000**

Executed an **MOU** with the Health Plans to support the provision of IHSS as a managed care benefit.

Drafted an IHSS Coordination Guide.

**Multipurpose Senior Services Program (MSSP) - 550**

Executed a **contract** with the Health Plans for the provision of MSSP Waiver Services to Plan Members.

Drafted an MSSP Coordination Guide.

**Behavioral Health Services (BHS)**

Executed an **MOA** with the Health Plans for the provision of Behavioral Health Services (specialty mental health and alcohol and drug services not covered by Medicare).
CARE PLAN OPTION SERVICES

- Case Management
- Care Transitions
- Home & Community-Based Services (HCBS)
EARLY ANALYSIS: AIS & ADRC

- Identified the need
- Identified users and others who would be interested or benefit
- Designed two potential models
- Assessed models
- Identified requirements to ramp up
- Identified and prioritized resolution of unknowns
SCAN FOUNDATION GRANT

- The project was supported by a grant from The SCAN Foundation - advancing a coordinated and easily navigated system of high-quality services for older adults that preserve dignity and independence.

- For more information, visit www.TheSCANFoundation.org.
THE HCBS BROKERAGE DESIGN TEAM

- Collaborative Consulting
- Local executive level thought leaders
  - Healthcare providers and payers
  - HCBS providers
- Aging & Independence Services representatives
GUIDE OBJECTIVES

- Outline potential models
- Provide considerations for brokerage development and implementation
- Use San Diego County case study to illustrate the concepts
- Not be prescriptive
BROKERAGE DESIGN PROCESS

OVERVIEW

Step 1: Design the Service Model
Step 2: Identify the Requirements
Step 3: Assess Viability
Step 4: Select the Business Model
Step 5: Resolve Unknowns
Step 6: Implement!
STEP 1: DESIGN THE SERVICE MODEL

- Existing State
- Unit of Service
- The Customer Experience – Service Delivery
  - Model A | Model B
- The Value Added - The Early Business Case
- Unknowns
STEP 2: IDENTIFY THE REQUIREMENTS

- Start Up (workspace & infrastructure)
- Workforce
- Technology
- Finance
- Audit and Compliance
- Legal and Contracting
- Risk Management
- Unknowns
STEP 3: ASSESS VIABILITY

- Market Analysis of Community Readiness
- Environmental Scan of Current Solutions
- Financial Viability Assessment
- Unknowns
STEP 4: SELECT THE BUSINESS MODEL

- Potential Business Structures
- Possible Legal Entities
  - Limited Liability Company (LLC)
  - L3C
  - S-Corp
  - Tax Exemption - 501 (c) (3)
  - AAA/ADRC
STEPS 5 & 6: RESOLVE UNKNOWNS & IMPLEMENT!

- Resolution of Uncertainties
- Marketing Strategy
- Implementation Plan
HCBS BROKERAGE DESIGN GUIDE

- Submitted to The SCAN Foundation
- Posted to the LTCIP website
- Distributing widely for communities interested in improving HCBS access
WHAT WE LEARNED

- There is strong support in San Diego County for an HCBS Brokerage
- We need to assess potential demand and capacity to meet the demand
QUESTIONS?

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