



# HOME & COMMUNITY-BASED SERVICES BROKERAGE DESIGN GUIDE

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

Brenda Schmitthenner

Renée Sherrill

County of San Diego, Aging & Independence Services



# COUNTY OF SAN DIEGO, AGING & INDEPENDENCE SERVICES



LIVE WELL  
SAN DIEGO



*Independence*

**CALL CENTER/ADRC**

*Dependence*

RSVP, Veterans  
Health Promotion  
Info & Assistance  
Outreach & Education

Senior Dining  
&  
Home-  
Delivery

Care Mgmt  
Adult Day Care  
Caregiver Support  
Care Transitions

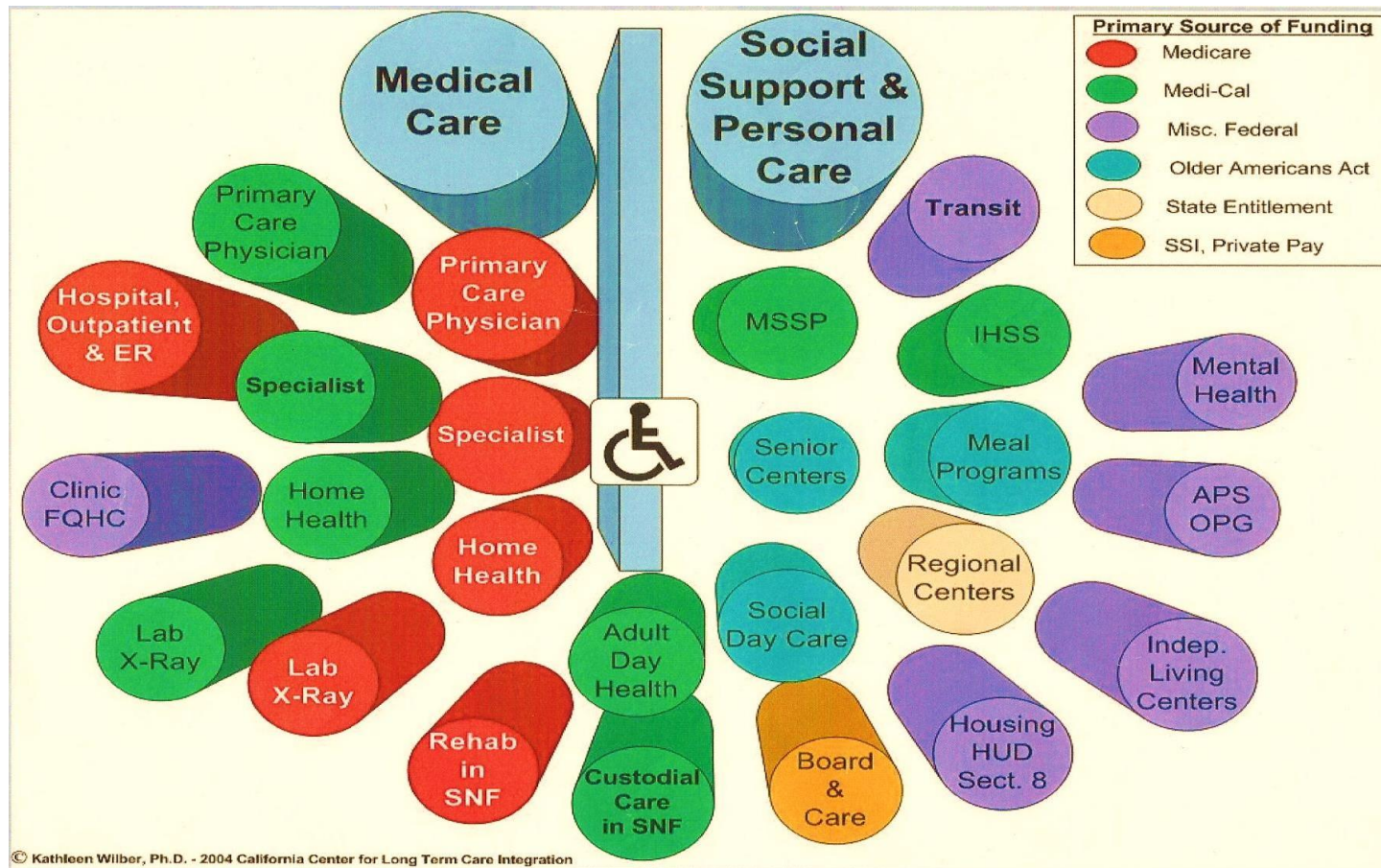
IHSS

APS  
Ombudsman  
Project Care  
PA/PG/PC  
Senior Team

**INTERGENERATIONAL**



# FRAGMENTED SYSTEM OF CARE





## COORDINATED, PERSON-CENTERED SYSTEM OF CARE



# LONG TERM CARE INTEGRATION PROJECT



## AGING & INDEPENDENCE SERVICES COUNTY OF SAN DIEGO ■ HEALTH AND HUMAN SERVICES AGENCY LONG TERM CARE INTEGRATION PROJECT

- Began 1999
- Today over 800 stakeholders
- Established mission, vision, goals
- Three strategies



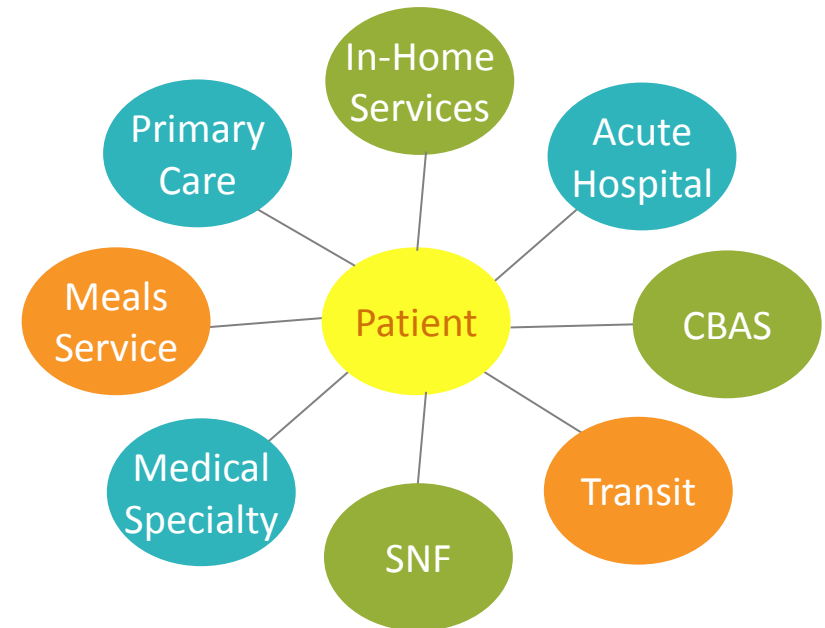
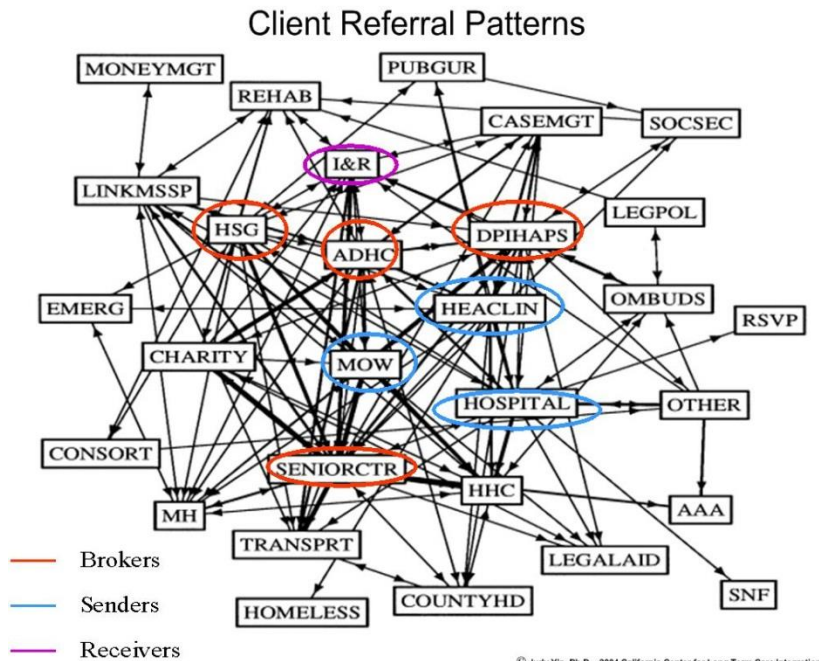






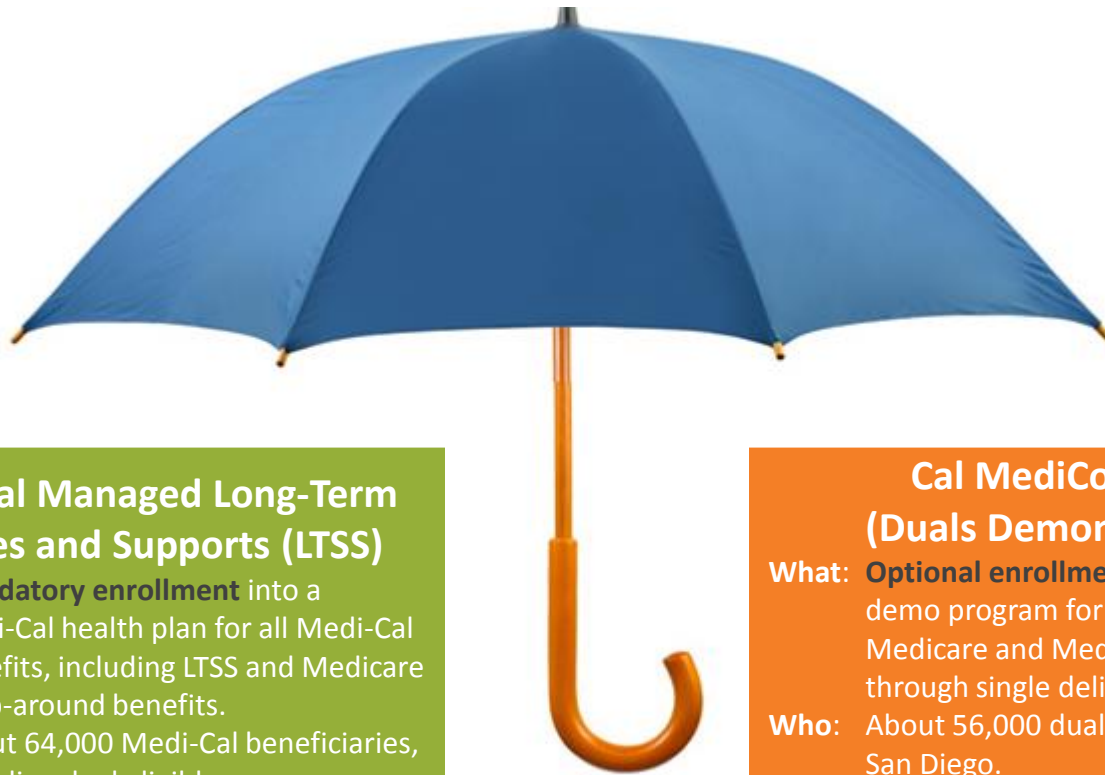
FROM THIS....

TO THIS...



AIS provides critical social support services through referral or direct provision to reduce the risk of a readmission.

# COORDINATED CARE INITIATIVE (CCI)



## 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.







## 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).



# AN OPPORTUNITY



**Healthcare Provider**



**1call...**



**Brokerage**



*Can include expert assessment  
& short term service coordination*

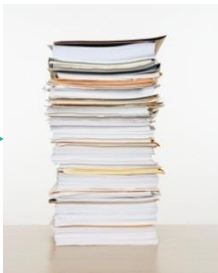


**HCBS Providers**

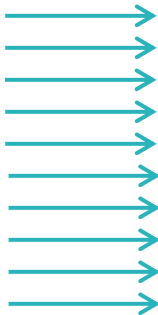


**... Numerous services**

**HCBS Providers**



**Numerous bills...**



**Brokerage**



**Healthcare Provider**



**...One invoice**



## 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](http://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





## 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 UNKNOWNNS & 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?

Brenda Schmitthenner, 858-495-5853

[Brenda.Schmitthenner@sdcounty.ca.gov](mailto:Brenda.Schmitthenner@sdcounty.ca.gov)

Renée Sherrill, 858-505-6541

[Renee.Sherrill@sdcounty.ca.gov](mailto:Renee.Sherrill@sdcounty.ca.gov)