



Expanding Self Direction: Empowering Members, Strengthening MCO Plans





Team Lineup



**Kathleen Dougherty, National
Director of Business
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Co-Founder Self-Direction
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**Self-Determination is
Enhancing Autonomy and
Improving Organizational
Effectiveness Across the
Nation.**



Small Beginnings

Founded in 2004, GT Independence was created out of the basic instinct of a parent trying to provide the very best options for their child.



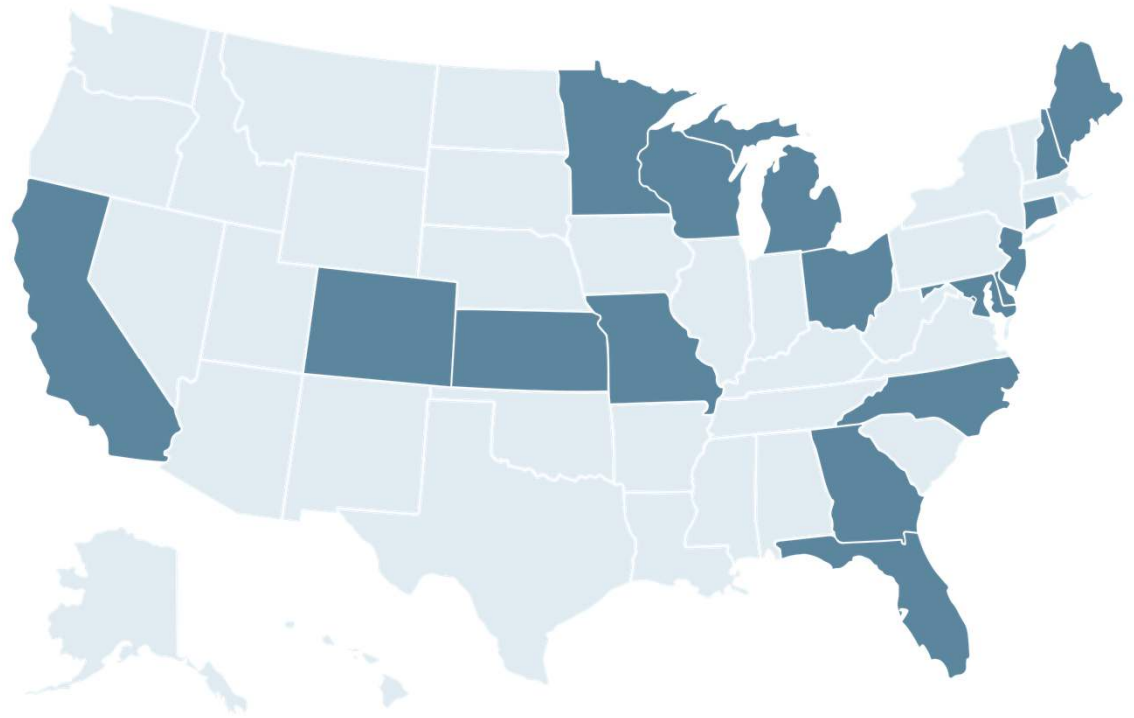
“I grew up with a brother who had a disability. But to me, he is just a big brother who does big brother things. Everything I do is to help people like him live a life that they choose for themselves.”

John Carmichael
CEO, GT Independence



Experienced and Expanding

- **Values-driven focus on self-direction**
- **Serving 55,000 across 17 states and the District of Columbia**
- **Diverse program knowledge**



Diversity is Our Strength

We are the most diverse FMS in terms of the programs, waivers, and people served. Our diverse workforce and program mix equip us best to collaborate and strategize approaches to support programmatic goals. We understand that state programs have complex considerations and differing priorities, and we are equipped to work collaboratively to customize experiences and supports to achieve success.



160

Contracts



67

Unique
Waivers/Programs



55,000+

Participants



22

Languages



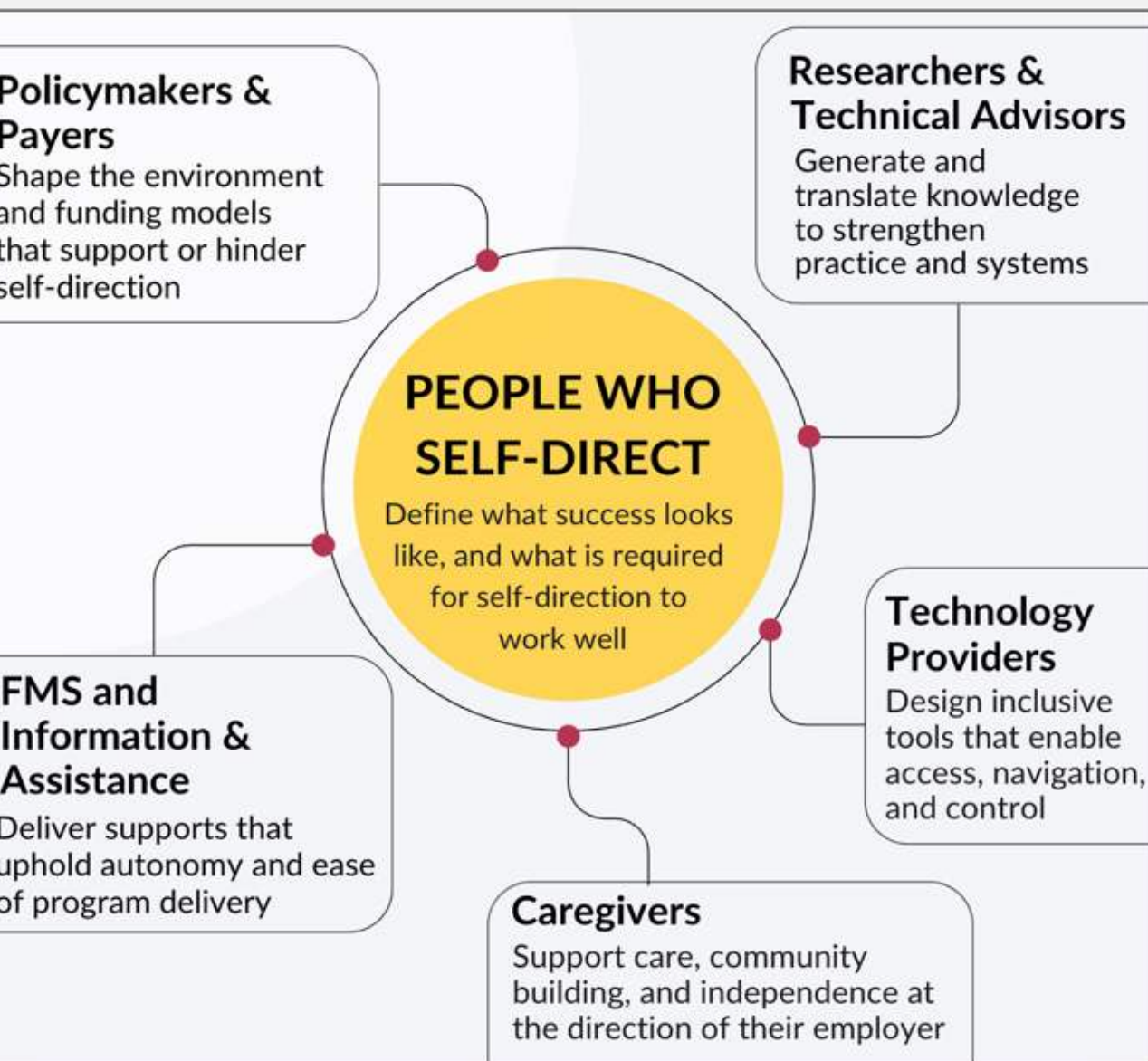
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Years of Age

About The Self-Direction Center

- National nonprofit, built on decades of work advancing self-direction across the USA
- Focus on centering people with lived experience
- Building community, providing education, and advancing research





Amplifying the Voice of Lived Experience

Our Origins: Cash & Counseling

Background:

- Rigorous, randomized controlled trial of self-direction as compared to traditional agency services
- 3 states: Arkansas, Florida, and New Jersey. Later replication studies in 12 additional states.
- Nearly 7,000 participants

Key Findings:

- The program had overwhelming positive effects on consumers of all ages, and their caregivers.
- Consumers who managed their own care were far happier with their care and their lives in general, and experienced no more—and in some cases significantly fewer—adverse events than those receiving agency care



Empowering Individual Autonomy

Self-direction allows individuals to choose who provides their care, when, and how, promoting autonomy and personal choice.

Alignment with Value-Based Care

Self-direction improves member satisfaction, compliance, and health outcomes, aligning with value-based care goals of MCOs.

Operational Efficiencies for MCOs

This model reduces administrative burdens and enhances caregiver retention, increasing operational efficiencies for Managed Care Organizations.

Regulatory Support and Strategic Opportunity

CMS supports self-direction through person-centered planning, giving MCOs a strategic opportunity to meet regulations and improve care quality.





Improved Compliance and Satisfaction



Higher Satisfaction Levels

Members report greater satisfaction by tailoring care delivery to their preferences and needs through self-direction.

Improved Health Outcomes

Self-direction reduces unmet care needs, lowers emergency visits, and contributes to better overall health outcomes.

Benefits for Managed Care Organizations

Improved compliance leads to predictable care, reduced risks, and enhanced performance in value-based care models.

Enhanced Member Autonomy

Self-direction allows members to choose trusted caregivers and schedule services fitting their routines, boosting engagement.



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Operational Improvements for MCOs



Caregiver Retention and Shift Reliability



OPERATIONAL METRIC	AGENCY-DIRECTED	SELF-DIRECTED
Caregiver Retention Rate	65%	85%
Missed Shift Rate	30%	10%
Continuity of Care	Moderate	High
Administrative Burden	High	Low

Cost Savings: Agency vs. Self-Directed Care Models



Aspect	Agency-Based Model	Self-Directed Model
Average Hourly Cost	\$21–\$40/hour (varies by state and service type) [h2hhc.com]	\$14–\$28/hour (often 20–30% lower than agency rates) [agingtoday.com]
Administrative Overhead	High – includes agency fees, supervision, compliance costs	Low – participants manage care directly, reducing overhead [macpac.gov]
Budget Control	Limited – agency controls spending	Full – participants allocate funds, set wages, and negotiate rates [medicaid.gov]
Estimated Cost Savings	—	10–30% savings over agency-based models, depending on state and program design [pb.applied...ection.com]
Program Examples	Traditional Medicaid HCBS	Cash & Counseling, 1915(c)/(j)/(k) Waivers, State Plan Options [macpac.gov]

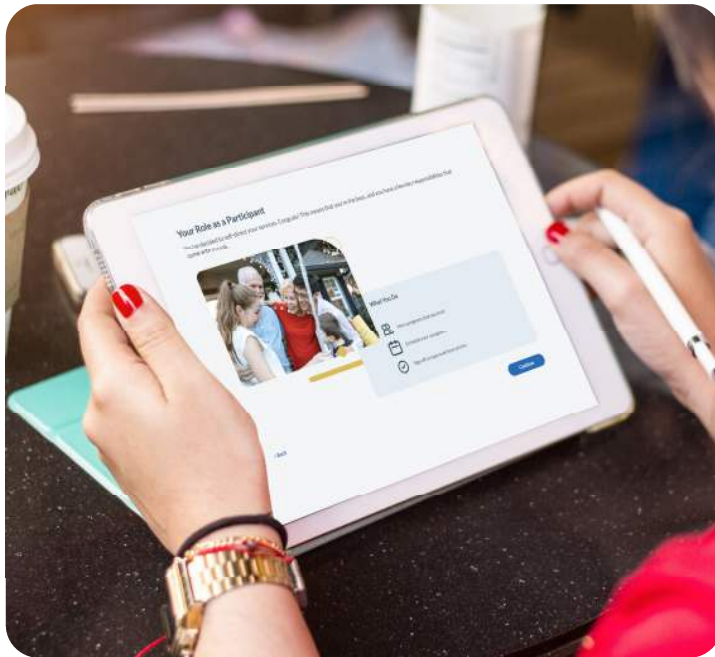
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Enrollment and Onboarding Process



Simple. Secure. Specialized for Self-Direction.

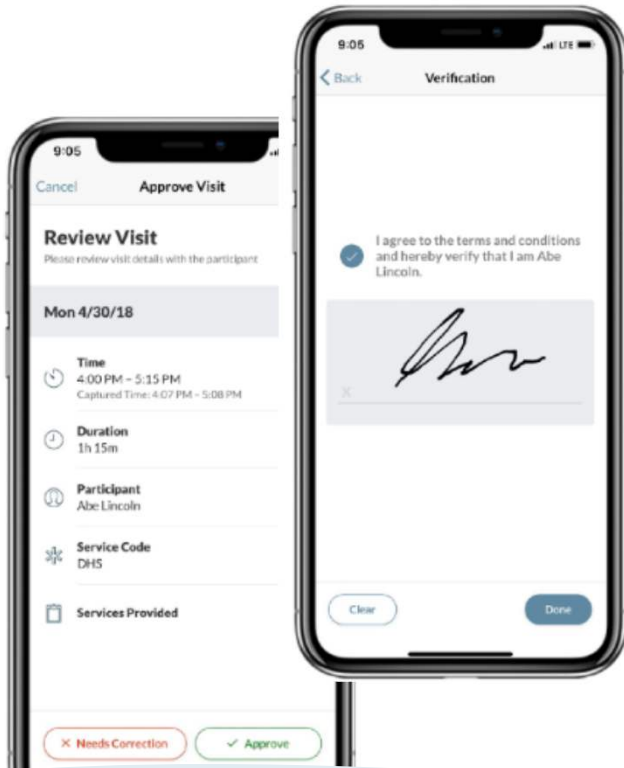


GT Enroll

- ✓ Easily collect demographic information one time
- ✓ Customize questions and forms based on state and program
- ✓ Simplified explanations with embedded videos
- ✓ Fully integrated to speed onboarding of participants and new hires
- ✓ Enrollments can be completed via self service, virtually or face-to-face



Simple. EVV Compliant. Free. Specialized for Self-Direction.



GT App

- ✓ EVV compliant timekeeping
- ✓ Integration with all national aggregators
- ✓ Track hours and get fast approval
- ✓ Secure and private
- ✓ Free to use and available in multiple languages
- ✓ Participant signature for approval/rejection of shifts for EVV entries on employee's device
- ✓ Two-factor PIN authentication to verify entry
- ✓ Use with or without internet



Real-Time Reports. Customizable. Caregiver Directory.

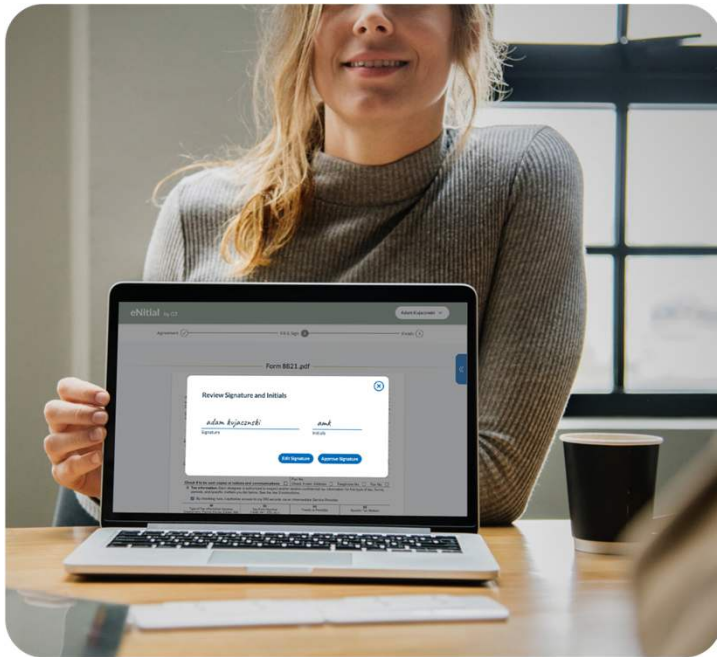


GT Portal

- ✓ Robust online portal to serve all self-direction stakeholders
- ✓ Access to real-time reports and documents, which enhances transparent communication
- ✓ Stay informed with news and updates from GT or contact GT to send important notifications about the people you serve
- ✓ Accessible from a phone, tablet, or computer
- ✓ Customized reports to meet Arizona's needs
- ✓ Built-in tools and resources for enhanced support
- ✓ Directory to connect participants with resources to find and hire additional caregivers



eNitial. Fast. Secure. Accurate. Paperless.

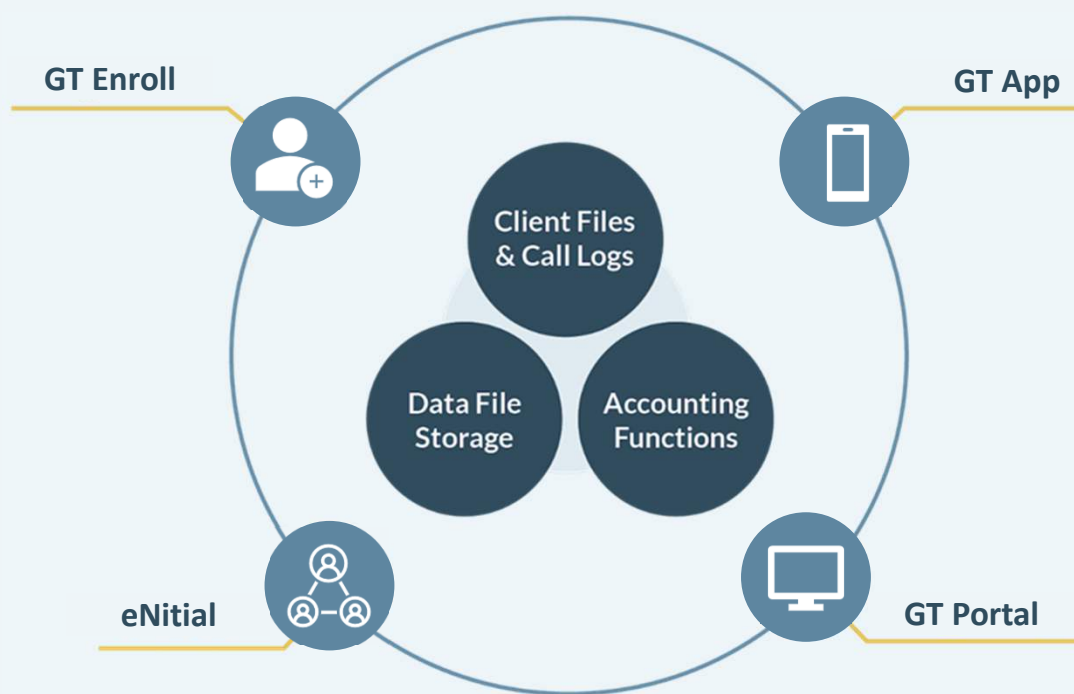


eNitial

- ✓ GT has full control over the signature process
- ✓ Meets all legal requirements of the **Electronic Signatures in Global and National Commerce Act (ESIGN Act)**
- ✓ Enhanced security measures to verify the signer's identity
- ✓ Instant availability of documents in all GT's systems
- ✓ Over 90% customer satisfaction



Proprietary System Integration



- Fully integrated system with superior functionality
- All systems built and managed by GT System Engineers
- Customizable features to meet specific stakeholder needs
- Real-time access to data and support



We Support Self-Determination



Fiscal Intermediary	Agency with Choice	Self-Direction	Fiscal Employer Agent	Employer Authority
Budget Authority	Enrollment	Onboarding	Support Brokerage	Customized Budget Tools
Individual Directed Goods and Services	Provider Credentialing	Electronic Visit Verification	Outcome-Based Surveying	Customized Reporting
Community Supported Living	Cost Share	Transportation Cards	Resource Development	Stakeholder Engagement



Thank You

Thank you for allowing us to
share best practices and
benefits of Self-Determination.

Questions?

