

Grant Approval Memo – Additional Information



Grantee: Independent Living Center - Homer
Request Amount: \$300,000.00
Project Title: Self-Directed HCBS (FY27)
Grant Term: 9/1/2026 to 8/31/2027
Trust Staff: Kelda Barstad

Self-Directed Home and Community Based Services 5 year plan – High Level

Year 1 (Completed): Community Engagement and Program Design

- Conduct statewide community forums and listening sessions.
- Engage participants, families, providers, advocates, Tribal partners, care coordinators, and other stakeholders.
- Research national self-direction models and best practices.
- Develop program design recommendations.
- Prepare and submit a summary report with next steps for consideration

Year 2 (FY27): Financial Design and System Development

- Research national best practices for financial design.
 - Provide recommendations on reimbursement methodologies.
 - Provide recommendations on resource allocation methodologies.
 - Provide recommendations on individual budget development.
 - Provide recommendations on Financial Management Services (FMS).
- Review and provide public comment on interRAI assessment and scoring approaches.
- Develop education and plain-language resources.
- Develop advocacy packet.
- Continue stakeholder engagement to inform program design and key implementation decisions.

Year 3: Policy Development and Implementation Readiness

- Provide input and public comment on proposed policies and procedures.
- Provide input and public comment on the CMS waiver application.
- Provide input and public comment on operational workflows.
- Support stakeholder review of implementation activities.
- Assist with development of SOA training and communication materials.
- Identify implementation barriers and recommend practical solutions prior to implementation.

Year 4: Implementation Support

- Provide participant, family, and provider education.
- Deliver technical assistance and implementation support.
- Conduct stakeholder outreach and engagement.
- Monitor implementation and identify barriers.
- Gather participant and stakeholder feedback.
- Provide ongoing recommendations to SDS to improve implementation and participant experience.

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Year 5: Evaluation and Continuous Improvement

- Evaluate participant outcomes and experiences.
- Review reimbursement methodologies and financial approaches.
- Identify opportunities for policy refinement.
- Evaluate implementation outcomes and program effectiveness.
- Review emerging national best practices.
- Provide strategic recommendations to SDS for continuous quality improvement and long-term sustainability.

Self-Directed Home and Community Based Services - Contractual Services

The Self-directed Home and Community Based Services project will utilize two contractors. Effective Health Design will provide project management technical assistance for the Independent Living Center (ILC). Applied Self Direction will provide expertise on implementing self-directed services and will take the lead on developing materials and other content to be customized for Alaska.

Effective Health Design

Effective Health Design (EHD) will provide consultation, technical assistance, strategic guidance, and project facilitation for the Independent Living Center to support the development of participant-directed service options within Alaska's Medicaid Home and Community-Based Services (HCBS) system. Responsibilities include project planning and facilitation, research and development of plain-language educational materials on national self-direction models, including resource allocation, participant budget development, and financial administration, coordination of statewide community forums to gather stakeholder input on key policy and operational issues, and development of outreach and communication materials.

Sandra Heffern is the President of Effective Health Design. Ms. Heffern has extensive experience in the design and implementation of home and community based long-term services and supports. She has worked as a consultant facilitating multi-organization collaborations, strategic visioning and policy development. Ms. Heffern is able to translate vision and direction into outcomes and measured results. She believes in efficiently run systems and has direct experience motivating agency staff to that end. Ms. Heffern has proven skills in developing collaborative relationships with a variety of competing stakeholders. Her alliances developed over years in the health and human service industry are invaluable. She has effectively developed partnerships with the administration, legislators, service providers and the business community.

Applied Self Direction

Applied Self-Direction is a technical assistance (TA) and membership organization for stakeholders in self-directed services across the United States. Applied Self-Direction specializes in operationalizing the philosophy of self-direction by offering practical expertise that helps create, expand, and enhance self-direction programs. We routinely provide consulting and TA to states, managed care organizations (MCOs), Financial Management Services (FMS) entities, and other organizations, such as self-advocacy groups, to help advance self-direction throughout the nation.

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Ines Rosas specializes in Medicaid-funded Home and Community-Based Services (HCBS), with expertise in self-direction programs and VHA-funded Veteran-Directed Care (VDC) programs. Ines has 15 years of experience in health and human services, including leading teams. Her work includes developing training curricula, supporting states and other stakeholders with program implementation, evaluation, and improvement, and conducting research on self-direction programs. Trilingual in English, Spanish, and French, she brings cross-cultural communication skills to her consulting practice. She holds a B.A. in Sociology with a Minor in Biology from Boston University and has pursued additional academic training in science at Université Joseph Fourier.

Erica Andres has over 20 years of experience working in the Health and Human Services field and has the added expertise of living a self-directed life and directing her own care for over 20 years. Erica has Spinal Muscular Atrophy and is a participant in the WI Self-Directed Program. Erica has spoken at many national and international conferences about her experience of living a self-directed life and the positive impact it has had on her. Prior to working at Applied Self-Direction, Erica worked as a Care Manager and Support Broker in the WI self-direction program. Erica has a variety of expertise in the world of self-direction. Erica holds degrees in Human Resources and Communication with a Minor in Marketing.

Laura Astor Mauldin provides policy analysis applicable to Financial Management Service (FMS) entities, conducts FMS Readiness Reviews, and provides operational guidance to FMS entities, specializing in the application of IRS Revenue Procedure 2013-39 to Fiscal/Employer Agents. Prior to working at ASD, Laura worked extensively with individuals who self-direct during program enrollment, coordinated quality assurance activities for self-direction programs, and established operational best practices for Financial Management Services around the country. Additionally, Laura was a program manager for a healthcare data analytics company focused on healthcare utilization, identifying outreach opportunities for both wellness and chronic conditions to decrease the overall cost of care. Laura received her Bachelor of Arts from Brandeis University with a double major in Economics and Politics, and a minor in Business and Managerial Economics.