Multi-State Survey of Support Brokers in Cash and Counseling Programs: Perceived Roles and Training Needs
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What is This?
One component of the Cash and Counseling program has been the significant contribution made by support brokers (also called support planners, counselors, or consultants) who assist participants to develop their own care plans. The Cash and Counseling program increases the autonomy of consumers by providing them with a budget roughly equivalent to what an agency would have spent on their behalf (Squillace, Mahoney, Loughlin, Simon-Rusinowitz, & Desmond, 2002). They are characterized by a wide array of choices and control for consumers, offering an important new option for people with disabilities. Unlike traditional care in which professional judgments are valued over consumers’ preferences, the participant-directed model is based on the premise that recipients of home care service know what their needs are and how to meet them (Kunkel & Nelson, 2006). Here, support brokers provide information and assistance on budgets and service arrangements to participants and monitor consumers’ use of their allowances (Simon-Rusinowitz et al., 2002). Thus, support brokers play a significant role in the program’s success by helping consumers maximize their choice and control when arranging services.

Despite the importance of support brokers in the program, there is still much to learn about their roles and training needs (Mahoney, Desmond, Simon-Rusinowitz, Loughlin, & Squillace, 2002; Quach, O’Connor, & McGaffigan, 2010). Morgan, Markwood, Eltzeroth, and Reed (2010) have demonstrated that Area Agencies on Aging (AAAs) are concerned about providing adequate resource to meet their staff’s training needs and their ability to keep staff appropriately trained. Furthermore, a study showed that support brokers struggle with their substantially revised roles and responsibilities in the program requiring a new set of training (McInnis-Dittrich, Simone, & Mahoney, 2006). Because many social service providers are not formally educated in social work (Morgan et al., 2010), as Bonifas (2011) stated, continuing education to current practitioners from diverse educational backgrounds is needed. Given the limited work on the actual implementation of support brokerage (Mahoney, Fishman, Doty, & Squillace, 2007; McInnis-Dittrich et al., 2006), this study will examine how support brokers perceive their roles, what education and training they have, how useful they find that training in their work, and where they want additional training. In addition to presenting study results, the
Purpose of this article is to guide the states in developing training curriculum that can effectively prepare support brokers for participant-directed practice.

The Cash and Counseling Program

The Cash and Counseling Program got underway in 1998 with funding from the Robert Wood Johnson Foundation and the Office of the Assistant Secretary for Planning and Evaluation within the Federal Department of Health and Human Services. The mission of the program was to increase the options and autonomy of people with disabilities by emphasizing consumer choice and control (Doty, Mahoney, & Sciegaj, 2010). This program provides consumers with a monthly allowance based on their level of need; each participant then (alone or with the help of a representative) develops an individualized budget so that they can direct and manage their own assistance by purchasing goods and services, or hiring the worker of their choice. Most participants use their allowances to hire workers to assist them with daily activities in various capacities, including personal care, and housework (Schore, Foster, & Phillips, 2007). Moreover, states are required to offer assistance to participants with planning and managing their services and fiscal services, including payroll. However, the states have the discretion to determine program eligibility and the amount of the cash allowance. For this reason, the states have generally similar Cash and Counseling programs, but each also has its own features.

While there has been extensive research on program participants, few studies have examined support brokers’ roles, how effective their academic training prepared them for these roles, or their ongoing training needs. A study that looked at how 12 Cash and Counseling participating states’ program directors operationalize support brokers’ roles revealed that states differ significantly in how they define and train their support brokers (Randall & Bekteshi, 2012). Briefly, Randall and Bekteshi (2012) stated that some states assigned tasks to a single support broker, while other states divided tasks between two or three support brokers or between support brokers and fiscal managers. In terms of the support broker’s educational background, program directors stated social work or human service majors were more appropriate for the support broker role. A recent survey of AAA human services staffs found that large percentages felt that their educational training did not prepare them to implement a participant-directed approach (National Association of Area Agencies on Aging, 2013). Yet, there are no studies that looked at the relationship between support brokers’ educational backgrounds and how easily they adapted to these new roles.

In relation to training needs, studies found that support brokers could benefit from additional training on assisting participants with service planning and budget development, decision making, and personal care provider management (Mahoney et al., 2002; Quach et al., 2010). In terms of budgeting, the start of participants using their individualized budget was often delayed when support brokers were unclear about permissible purchases. The authors suggested that because service satisfaction was significantly higher when the lag time between choosing to self-direct and actually managing a budget was short, support brokers must be accountable for assisting participants with budgeting and need to receive training on this topic. In addition, support brokers were especially challenged when participants’ representatives were too passive or too involved in the decision-making process. Finally, according to Mahoney et al. (2010), support brokers should be trained to help participants manage their assistants regarding how to conduct background checks, develop back up plans, pay their assistants, and complete payroll.

In addition, barriers to implementing person-centered approach, as listed by staffs in social work-oriented positions, include lack of funding and limited number of dedicated managers to focus on the workforce development (National Association of Area Agencies on Aging, 2013). Moreover, lack of urgency to shift the training paradigm to the person-centered approach and limited appropriate amount of resources allocation for the training programs are the major hurdles for its implementation. Given recent policy developments at the federal level toward increasing the numbers of elders and persons with disability self-directing their long-term services and supports, it is important to understand the self-perceived roles, training, and educational backgrounds of support brokers.

Method

Participants

This study was sponsored by the National Resource Center for Participant-Directed Services. For this study, three states were chosen because they represented different program designs for support brokers’ roles. In addition, these states were chosen because they offered a range of participant-directed services with a large number of enrollees. At the time the Robert Wood John Foundation grants ended (O’Keeffe, 2009), State A had 984 enrollees, State B 1,442, and State C 673. Although each state required prospective support brokers to be at least 18 years old and pass background and certification checks, the three states varied in their employment requirements, training, and operations. State A gives its support brokers 6 hr of initial training over the course of 2.5 days. In State B, support brokers must complete 14 hr of training each year. In State C, support brokers need to receive a minimum of 6 hr of training before they begin work. In State A, participants must work with a case manager who handles enrollment and monitoring and
a separate support broker who offers guidance and assistance developing a budget. In State B, once consumers choose to participate in the Cash and Counseling program, they no longer work with a case manager, thereby, enhancing the role of support brokers. If participants receive services from traditional and Cash and Counseling programs, support brokers are permitted to do case management activities. However, in State C, participants are not required to have a support broker. They can receive assistance regarding the Cash and Counseling program from their case manager or from support brokers who may be family members. However, because case managers are assigned only 2 hr per month to work with self-directing participants, the majority of participants chose to work with support brokers.

Survey Design

The purpose of the short survey was to gather general information and generate a list of support brokers who were willing to take part in longer qualitative interviews. The survey questionnaire design was informed by extensive literature review (Mahoney et al., 2002; Quach et al., 2010; Randall & Bekteshi, 2012) and input from an advisory committee. The advisory committee was composed of experts in various aspects of self-direction. Prior to distributing the survey, an initial pilot study consisting of two participants was conducted to test the survey design. Based on the results of this pilot test, questions were reorganized for easier reading and clarity.

The final questionnaire asked support brokers about their role on 20 items covering 10 tasks including providing participants with information about self-direction, informing participants of their rights and responsibilities, documenting and record keeping, developing a spending plan, obtaining services included in the service plan, and reporting critical events that may affect their safety. Other possible tasks included training participants to hire, manage, and terminate personally hired workers, and meeting state requirements for employers. Under each task, there were three sub-questions asking whether support brokers felt responsible for a given task; the availability of training; and support brokers’ self-reported preparedness to do such a task. The first two questions were binary coded 0 (no) and 1 (yes). The self-reported preparedness scores were coded using a 5-point Likert scale ranging from 1 (not at all) to 5 (very well). An open-ended question was added to identify any training they would like to receive in the future.

Procedure and Analysis

To understand how support brokers perform their roles and identify training needs, this study involved two phases of data collection from support brokers. First, we distributed a short survey to support brokers who were currently working with participants. The survey was administered electronically using the survey software Qualtrics between January 2011 and May 2011. Prior to distributing the survey, we asked state program directors in each state to email the survey description and a web link to the survey. Up to three reminder emails were sent by the program directors over the next month. A convenience sample of 138 support brokers (60 from State A, 37 from State B, and 41 from State C) participated in the survey for an overall response rate of 7% for States A and C and 3% for State B. While not representative, this is the first attempt to receive feedback from individual support brokers across states. Given the exploratory nature of the written survey design, univariate and bivariate analyses were conducted using Statistical Program for Social Sciences 18.0.

The second phase comprised follow-up interviews. Based on the preliminary analysis of the written survey, a qualitative interview was designed to identify the logic behind why support brokers had different role perceptions and training needs. For instance, in cases where support brokers said they were not responsible for the given task, we asked who was responsible for performing the task. If support brokers received training, then we asked who trained them and what type of training they received. If participants had not received training, then follow-up questions were asked to ascertain what stopped them from receiving training. A researcher conducted telephone interviews with support brokers who agreed to participate in the interview. Among those who consented, five participants from each state were randomly selected for the telephone interview. The average interview lasted approximately 40 min and each interview was recorded and transcribed verbatim. HyperResearch software was used for data entry and coding. Consistent with grounded theory (Strauss & Corbin, 1998), the data analysis involved identification of a thematic framework and interpretation. The thematic framework was developed by the researcher and validated by the advisory team through discussion of the emerging themes.

Results

As shown in Table 1, there were wide differences in total number of cases, and the working experience, and education among support brokers across three states. Striking state differences arose in the caseloads: The majority of support brokers in State A (74%) had fewer than 20 total cases, while the majority of support brokers in States B (55%) and C (86%) had more than 20 cases. However, within the total caseload, support brokers in each state served non-Cash and Counseling participants as well as those who were self-directing, and this trend was especially prominent in State B where nearly a quarter of clients were not enrolled in a Cash and Counseling program. In terms of
support brokers’ working experience, support brokers from State C had the longest working experience in the social service field as well as with the Cash and Counseling program. In relation to education, State A had the highest proportion (39%) of support brokers with only high school degrees, while the majority of support brokers in the other two states had at least bachelor’s degrees and higher. Among the support brokers who held at least a bachelor’s degree, social work was by far the most typical subject concentration in all three states. After social work, the next most popular background varied by state.

Perceived Roles, Completion of Training, and Preparedness to Perform Tasks

Support brokers’ perceptions of their roles, training, and preparedness are presented in Table 2. Although few outliers were observed, in general, state B, where support brokers typically take over all the duties of case managers, yielded higher scores than the other two states.

Concepts of Participant Direction

Overall, most support brokers from participating states felt responsible for explaining the concepts of Cash and Counseling and received training to do so. Also, nearly all support brokers felt relatively comfortable performing this task with self-reported preparedness scores ranging from 3.8 to 4.36, with a possible range from 1 to 5 with 5 being the most fully prepared. The same pattern held true for explaining overall participant rights and responsibilities.

Documentation and Record Keeping

A large number of support brokers across all the states reported being responsible for providing information to participants on documentation and record keeping. Despite the fact that only 57% to 81% of support brokers received training, their self-reported preparedness was again high ranging from 3.8 to 4.14.

Spending Plan

We created two tasks under the spending plan category: providing participant information on developing a spending plan and obtaining services included in a spending plan. With regard to help in developing a spending plan, the vast majority of the support brokers felt responsible for such a task and received training to perform the role. As expected, support brokers felt well prepared and comfortable performing this task with scores of 4.08 to 4.37 out of a possible 5.

The next task was to provide consumers information on how to obtain services included in the spending plan. Despite the fact that a large majority of support brokers indicated they felt responsible for this task, a smaller percentage reported

### Table 1. Selected Baseline Characteristics of Support Brokers Serving Cash and Counseling Participants in Three States.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>State A (n = 60)</th>
<th>State B (n = 37)</th>
<th>State C (n = 41)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total caseload</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 20 (%)</td>
<td>74</td>
<td>45</td>
<td>14</td>
</tr>
<tr>
<td>Between 21 and 40 (%)</td>
<td>10</td>
<td>18</td>
<td>83</td>
</tr>
<tr>
<td>More than 41 (%)</td>
<td>16</td>
<td>37</td>
<td>3</td>
</tr>
<tr>
<td>Percentage of caseload in the Cash and Counseling program</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between 1 and 24 (%)</td>
<td>12</td>
<td>24</td>
<td>3</td>
</tr>
<tr>
<td>Between 25 and 49 (%)</td>
<td>4</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Between 50 and 74 (%)</td>
<td>2</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>More than 75 (%)</td>
<td>82</td>
<td>60</td>
<td>85</td>
</tr>
<tr>
<td>Working experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average years working in social service field</td>
<td>10.4 (11.04)</td>
<td>7.39 (8.1)</td>
<td>15 (10.80)</td>
</tr>
<tr>
<td>Average years working with the Cash and Counseling program</td>
<td>2.3 (1.43)</td>
<td>1.62 (1.16)</td>
<td>5.07 (3.25)</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High school (%)</td>
<td>39</td>
<td>0</td>
<td>17</td>
</tr>
<tr>
<td>Bachelor (%)</td>
<td>47</td>
<td>61</td>
<td>63</td>
</tr>
<tr>
<td>Graduate school (%)</td>
<td>14</td>
<td>39</td>
<td>20</td>
</tr>
<tr>
<td>Participant’s academic major with at least college degree (%)</td>
<td>Social work (28.6)</td>
<td>Social work (52.2)</td>
<td>Social work (21.2)</td>
</tr>
<tr>
<td></td>
<td>Accounting (22.9)</td>
<td>Psychology (18.4)</td>
<td>Psychology (12.1)</td>
</tr>
<tr>
<td></td>
<td>Education (20)</td>
<td>Education (8.1)</td>
<td>Nursing (9.1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sociology (9.1)</td>
</tr>
</tbody>
</table>

Note. Standard deviations are given in parentheses.
receiving training. The mean preparedness score was also a little lower than the comfort level with the previous task.

**Reporting Critical Events**

A notable difference was identified between states regarding the task of providing participants with information on reporting critical events, including anything that affects the health and safety of participants. For instance, only half of support brokers in State A felt responsible for this task, while nearly everyone from State B did. In addition, only 42% of State A’s support brokers received training, while about 74% in State B did. Support brokers in all three states felt only moderately prepared showing scores of 3.27 to 3.88 out of 5.
**Personally Hired Workers**

This section consists of four tasks including helping the participant prepare for hiring, managing, and dismissing personally hired workers, and meeting state requirements for employers. Overall, compared with other tasks, support brokers generally felt less responsible and less prepared to perform these responsibilities. With the exception of State B, half or less of support brokers stated that they were not responsible for these tasks and had not received training. The discrepancy between the states was the largest regarding the role of assisting participants with training on meeting state requirements for employers with State B scoring substantially higher than the other two states. Overall, support brokers were the least prepared to perform this task.

**Most Discussed Training Needs**

In terms of the support brokers’ training needs, four themes emerged. First, support brokers expressed their need for periodic ongoing training. Many support brokers stated that they would like to take a refresher course on regular basis. More specifically, support brokers wanted ongoing training that was geared toward them, not to staff in general. Seminars were preferred to online instruction. One support broker suggested submitting questions prior to receiving the training and spending time on the parts that were difficult. Some support brokers preferred online training because of its convenience. Second, updates on regulations and available resources were frequently discussed. Moreover, support brokers wanted to be notified whenever there was a change in the program and to have a user-friendly website to find such information. Third, the need for clear role division between case managers and support brokers was frequently mentioned. This was commonly mentioned among states (States A and C) where support brokers work and coordinate activities with case managers. Last, support brokers wanted to receive training on employer and employee related issues. More specifically, support brokers wanted to learn how to settle disagreements between employers and employees and wanted information on labor regulations.

**The Effect of Field of Study on Preparedness**

We then examined the connection between support brokers’ professional background and their comfort with the support broker role. We began by comparing the mean preparedness score between support brokers with a high school diploma and those with bachelor’s degrees and higher. To assess whether the mean of preparedness for each task was different by educational background, t-tests were used. The t-test results revealed that differences in mean scores by educational backgrounds in States A and C were not statistically significant. State B was excluded from this analysis because all support brokers had at least a bachelor’s degree.

Second, to understand the population with bachelor’s degrees and higher, we divided the population according to subject concentration. Here, we picked the most popular major, social work, and compared it with other majors such as psychology and sociology from each state. Among three states, four tasks from State C were statistically significant (see Table 3). In State C, support brokers with social work backgrounds scored the lowest on providing participants with information about concepts of self-direction, participant rights and responsibilities, developing spending plans, and providing training with personally hired workers. Unlike the other two states, the t tests indicated that the differences in mean score between support brokers with social work backgrounds and those with other majors were statistically significant.

In relation to the other two most popular educational backgrounds with social work, only support brokers with social work backgrounds from State C had a statistically significantly lower score than others. In State C, support brokers with social work backgrounds had the lowest scores in 7 out of 10 given tasks. Among the seven lowest scores, five tasks were significantly different. These included providing participants with information about documentation/record keeping and how to report critical events. In addition, the results showed that support brokers with nursing backgrounds felt less prepared to provide participants with training on managing, dismissing employees, and meeting state requirements.

**What Does the Qualitative Data Add?**

Follow-up interviews with five support brokers from each state were conducted to enhance our understanding of the survey results. A sequential qualitative interview is recommended to supplement and strengthen the data collection (Singleton & Straits, 2010). Among support brokers who said that certain tasks were not their responsibilities, the majority claimed that consumers should take charge of these tasks. One described a common expectation of consumers’ roles with personally hired workers: “The person who hires workers is kind of an overseer. Once I signed them (consumer) on, I don’t have a lot to do with the provider (personally hired workers).”

Case managers were also frequently mentioned as a primary person in charge of these tasks among states where support brokers and case managers work together:

I answer questions related to the spending plan. Things beyond that, I figured, is probably the case manager’s responsibility. When additional things come up I say you should ask your case manager or email the case manager so-and-so has a question.

In response to the question about what prohibited support brokers from completing training, the majority said that there was no formal training available. For this reason,
support brokers reported that they taught themselves or received on-the-job guidance: “I just kind of followed support brokers and went on a few home visits they did. But there was nothing formal. I’d like to learn a little bit more.”

Discussion

Support brokers are an integral part of the Cash and Counseling program and their evolving roles are central to the success of this program. The current study attempted to explore how support brokers perceive their roles, what education and training they have, how useful they find that training in their work, and where they want additional training. The survey results indicate that support brokers’ self-perceived roles varied across three states. This result is predictable because the management of the program varies by state (Randall & Bekteshi, 2012), yet the state where support brokers typically take over all the duties of case managers felt more responsible for given tasks than other two states where support brokers work with case managers. Thus, a program that enhances support broker’s roles by allowing them to work with participants directly may increase support brokers’ perceived responsibility. Moreover, support brokers’ educational status may correlate with their perceived responsibilities. For instance, the state where majority of support brokers had higher education felt more responsible for the given tasks than other two states where majority of support brokers were composed of high school graduates. Interestingly, the results also showed that the perceived roles were not consistent even within individual states. The data show that the types of services may differ by support brokers’ own interpretation of their role. In other words, consumers may receive different services depending on their support brokers. This raises concerns on the uniformity of the program services participants receive from the state.

The fundamental cause of the inconsistency in support brokers’ self-perceived role may stem from the lack of available training. The results show an inconsistency in completion of training among support brokers. The study also reveals that the percentage of support brokers who completed the training was lower on tasks that they did not perceive as their role. Also, even when support brokers said that certain tasks were their responsibilities, they sometimes did not receive training for the job, and even when they did receive training that did not necessarily make them feel fully prepared. These results are consistent with the findings from Randall and Bekteshi (2012), where states were not able to provide all the required training for support brokers.

In relation to the support brokers’ training needs, training programs should be designed to emphasize the support brokers’ role assisting participants to manage personally hired workers.

It is significant to note that support brokers reported low comfort levels in helping participants prepare tasks related to personally hired workers. Given the importance of personally hired workers in the program, support brokers’ lack of confidence in performing roles pertaining to these tasks raises significant concerns. In addition, the state should provide refresher courses to support brokers. Updates on regulations and available resources through a user-friendly website were also requested. In addition, clear role division between case managers and support brokers was frequently mentioned in states where support brokers and case managers work together.

The effect of educational backgrounds on support brokerage is interesting but controversial. In this study, support brokers with advanced degrees had lower scores on feeling prepared. One possible explanation is that social workers might be more aware of what they do not know. However, another explanation deserves exploration. Although the number of respondents was quite small, it appears that those with social work backgrounds were less prepared while support brokers with other majors were more likely to perceive the role of support broker as easier. Empowering participants is necessary; however, as Saleebey (1996) stated, “Pursuing a practice based on the ideas of resilience, rebound, possibility and transformation is difficult because, oddly enough, it is not natural to the world of helping and service” (p. 297). Saleebey (1996) further stated that it takes courage and diligence for social workers to regard professional work through this new perspective. For instance, social workers who had been trained

| Table 3. Estimates of Means of Preparedness Scores Comparing Social Work Majors and Other College Majors in State C. |
|-------------------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Tasks                                           | Social work     | Other majors    | 95% CI          | 95% CI          | 95% CI          | 95% CI          | 95% CI          | 95% CI          |
|                                                 | M               | M               | p               | Lower limit     | Upper limit     | Lower limit     | Upper limit     | Lower limit     | Upper limit     |
| Providing participants with information about    |                 |                 |                 |                 |                 |                 |                 |                 |
| Self-direction concept                          | 3.57 (n = 7)    | 4.54 (n = 24)   | .010            | −1.70           | −0.25           |                 |                 |                 |
| Participant rights and responsibilities         | 3.86 (n = 7)    | 4.50 (n = 24)   | .045            | −1.27           | −0.01           |                 |                 |                 |
| Developing spending plan                        | 3.57 (n = 7)    | 4.56 (n = 25)   | .008            | −1.70           | −0.28           |                 |                 |                 |
| Providing participants with training for        |                 |                 |                 |                 |                 |                 |                 |                 |
| Hiring personally hired worker                  | 2.33 (n = 6)    | 3.64 (n = 22)   | .032            | −2.48           | −0.12           |                 |                 |                 |

*95% confidence intervals for the differences between social work majors and other college majors.
as case managers sometimes resisted this shift from the traditional model, where professionals make decisions for participants, to the participant-directed empowerment model, which focuses on the participants’ choice (Kunkel & Nelson, 2006; McInnis-Dittrich et al., 2006; Phillips, Mahoney, & Foster, 2006). Case managers who were reluctant to adopt the participant-directed model perceived this change as loss of their professional identity (Clark & Spafford, 2002). Moreover, Saleebey (1996) stated that it is often the system such as bureaucracies, policies, and programs that is opposed to a strengths orientation. On other hand, other fields such as rehabilitation counseling have already put in place participant-directed models as evidenced by accreditation standards for undergraduate and graduate education programs. For instance, the Council on Rehabilitation Education (CORE) states that students must learn the skills necessary to develop, maintain, and discontinue helping relationships in ways that empower people with disabilities (CORE, 2013). To reduce this gap among support brokers, training needs to move beyond the technicalities and engage students in an open and ongoing discussion, emphasizing the importance of this empowerment paradigm shift to their professional practice. This would help minimize the powerlessness that support brokers feel when change is imposed on them. Further research with more support brokers is needed to ascertain the differences by educational backgrounds.

Support brokers are fulfilling varied tasks depending on the state. To translate the findings of this study into practice, we suggest that states define the support brokers’ tasks, define the essential competencies for those tasks, and ensure that each state has a plan to identify and train support brokers in those competencies. In addition, it is critical that state leaders become more aware of tasks that support brokers feel less prepared to handle when designing training programs. We suggest that states be more aware of support brokers’ educational differences when designing support brokers’ training programs. Although very little research exists on the best methods in training support brokers, the literature discusses the importance of such training (Mahoney et al., 2002; Morgan et al., 2010; Quach et al., 2009). Tailoring training based on needs and educational backgrounds will hopefully lead to a more effective training program.

Although this study provides interesting findings about support brokers’ roles and training needs, the results should be viewed in context. This study is based on feedback from a limited number of support brokers in three states and may not be a representative of support brokers throughout the country. Moreover, the study had a low response rate, which may not be representative of the support brokers within the three states. In addition, it is important to recognize that support brokers are a diverse population with many subgroups characterized by age, geographic location, and ethnicity. Each of these populations is likely to have different perceptions of their role. Thus, future research should include larger samples to accommodate these differences. Despite these limitations, the study was the first to investigate the perceived roles and training needs of support brokers at the national level. In addition, this pioneering study identified specific areas that support brokers deem important for improving their preparedness.

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