

Home and Community Based Services (HCBS) Rate Study

**Provider Survey Analysis -
Case Management and Consultant Services**

- prepared for -

**New Mexico Health Care Authority -
Developmental Disabilities Supports Division**

- prepared by -

Burns & Associates, a Division of Health Management Associates
<https://www.healthmanagement.com/about/burns-associates/>

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Survey Participation by Waiver and Service

| | Response Rate (Billing Providers) | | | Response Rate (FY2024 Payments) | | |
|--------------------------------------|--|----------------------|----------------------|--|---------------------------|----------------------|
| | Ct. Providers | Ct. Responded | Response Rate | Total FY24 Claims | Claims w/ Response | Response Rate |
| Case Management On-going (DD Waiver) | 11 | 11 | 100% | \$17,824,387 | \$17,824,387 | 100% |
| Case Management On-going (MF Waiver) | 1 | 1 | 100% | | | |
| Consultant Services (Mi Via Waiver) | 11 | 11 | 100% | \$13,588,180 | \$13,588,180 | 100% |

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Case Management/ Consultant Wages or Monthly Payment per Case

| Survey Count | Reported Hours | Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers | Reported Hours | Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers |
|--------------|----------------|---------------------|----------------------|--------|---------------------------|----------------------------|----------------|---------------------|----------------------|--------|---------------------------|----------------------------|
|--------------|----------------|---------------------|----------------------|--------|---------------------------|----------------------------|----------------|---------------------|----------------------|--------|---------------------------|----------------------------|

Hourly Wages

| | | Employees | | | | | | Employees Excluding Supervisors | | | | | |
|--------------------------|---|-----------|---------|---------|---------|---------|---------|---------------------------------|---------|---------|---------|---------|---------|
| Case Manager (DD Waiver) | 2 | 40,400 | \$19.97 | \$19.97 | \$19.97 | \$20.35 | \$20.35 | 38,320 | \$19.19 | \$19.19 | \$19.19 | \$20.07 | \$20.07 |
| Consultant (Mi Via) | 5 | 121,117 | \$24.03 | \$24.03 | \$26.66 | \$28.26 | \$28.26 | 106,887 | \$24.14 | \$24.14 | \$25.93 | \$25.33 | \$25.33 |

Payment per Case per Month

| | | Employees | | | | | | Employees Excluding Supervisors | | | | | |
|--------------------------|---|-----------|----------|----------|----------|----------|----------|---------------------------------|----------|----------|----------|----------|----------|
| Case Manager (DD Waiver) | 3 | | \$367.26 | \$367.26 | \$370.79 | \$359.70 | \$359.70 | | \$273.00 | \$273.00 | \$273.00 | \$273.00 | \$273.00 |

Payment per Case per Month

| | | Contractors | | | | | | Contractors Excluding Supervisors | | | | | |
|--------------------------|---|-------------|----------|----------|----------|----------|----------|-----------------------------------|----------|----------|----------|----------|----------|
| Case Manager (DD Waiver) | 8 | | \$307.16 | \$307.16 | \$302.20 | \$322.92 | \$322.92 | | \$306.54 | \$306.54 | \$302.20 | \$320.81 | \$320.81 |
| Consultant (Mi Via) | 6 | | \$279.94 | \$279.94 | \$331.57 | \$332.87 | \$332.87 | | \$279.94 | \$279.94 | \$331.57 | \$332.58 | \$332.58 |

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Average Annual Turnover Rates Reported by Providers per Staff Type

| | Employees | | | | | |
|--------------------------|-------------------------|--------------------------------|---------------------------------|---------------|--|---|
| | Survey Count | Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers |
| Case Manager (DD Waiver) | 2 | 16.0% | 16.0% | 16.0% | 8.0% | 8.0% |

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Average Annual Training Hours in First and After First Year of Service per by Staff Type

| | Training Hours in First Year | | | | | | Training Hours After the First Year | | | | | | Est. Annual Training Hours Based on Reported Turnover | | | | | |
|--|------------------------------|---------------------|----------------------|--------|---------------------------|----------------------------|-------------------------------------|---------------------|----------------------|--------|---------------------------|----------------------------|---|----------------------|--------|---------------------------|----------------------------|--|
| | Survey Count | Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers | Survey Count | Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers | Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers | |

Employees

| | | | | | | | | | | | | | | | | | |
|--------------------------|---|-----|-----|-----|-----|-----|---|----|----|----|----|----|----|----|----|----|----|
| Case Manager (DD Waiver) | 2 | 264 | 264 | 264 | 460 | 460 | 0 | 30 | 30 | 30 | 39 | 39 | 49 | 49 | 49 | 72 | 72 |
| Consultant (Mi Via) | 4 | 166 | 166 | 80 | 48 | 48 | 0 | 50 | 50 | 40 | 41 | 41 | 96 | 96 | 56 | 44 | 44 |

Contractors

| | | | | | | | | | | | | | | | | | |
|--------------------------|---|----|----|----|----|----|---|----|----|----|----|----|----|----|----|----|----|
| Case Manager (DD Waiver) | 3 | 55 | 55 | 50 | 61 | 61 | 0 | 18 | 18 | 20 | 18 | 18 | 22 | 22 | 23 | 22 | 22 |
| Consultant (Mi Via) | 4 | 57 | 57 | 40 | 41 | 41 | 0 | 34 | 34 | 30 | 22 | 22 | 38 | 38 | 32 | 25 | 25 |

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Benefits for Case Managers and Consultants

| | Full-Time | Part-Time |
|-----------------------------|-----------|-----------|
| Responding Providers | 10 | 2 |
| Ct. Reported Staff | 121 | 3 |

| Benefit | Access to Benefit | | | | Eligibility among Agencies that Offer Benefit | | | | | | | | | | Benefit Level Among Staff Receiving Benefit ² | | | | | Effective Benefit Level ³ |
|---------|---------------------|--------------------------|--------------------------|----------------------------|---|---------------------------------|--------|---|--|------------------------------|---------------------------------|--------|---|--|--|---------------------------------|--------|---|--|--------------------------------------|
| | Responding Agencies | # of Agencies that Offer | % of Agencies that Offer | % of Staff who Have Access | % of Staff Eligible | | | | | % of Staff Participating | | | | | | | | | | |
| | | | | | Average (Mean) with Outliers | Average (Mean) without Outliers | Median | Weighted Average with Outliers ¹ | Weighted Average without Outliers ¹ | Average (Mean) with Outliers | Average (Mean) without Outliers | Median | Weighted Average with Outliers ¹ | Weighted Average without Outliers ¹ | Average (Mean) with Outliers | Average (Mean) without Outliers | Median | Weighted Average with Outliers ¹ | Weighted Average without Outliers ¹ | |

Full-Time

| | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|----|---|-----|-----|------|------|------|------|------|-----|-----|------|-----|-----|-------|-------|-------|-------|-------|-------|------|
| Holidays | 10 | 7 | 70% | 67% | 100% | 100% | 100% | 100% | 100% | | | | | | | 15.6 | 12.5 | 14.0 | 14.6 | 12.7 | 8.5 |
| Paid Time Off | 10 | 8 | 80% | 84% | 93% | 100% | 100% | 97% | 100% | | | | | | | 18.6 | 15.7 | 17.0 | 17.7 | 13.7 | 11.6 |
| Health Insurance | 10 | 7 | 70% | 83% | 89% | 98% | 100% | 96% | 99% | 47% | 47% | 56% | 52% | 52% | \$808 | \$808 | \$811 | \$884 | \$884 | \$383 | |
| Other Benefits | 10 | 6 | 60% | 78% | 90% | 100% | 100% | 97% | 100% | 85% | 85% | 100% | 85% | 85% | \$173 | \$173 | \$173 | \$183 | \$183 | \$121 | |

Part-Time

| | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|---|---|-----|----|------|------|------|------|------|---|---|---|---|---|---|-----|-----|-----|-----|-----|-----|
| Holidays | 2 | 0 | 0% | 0% | - | - | - | - | - | | | | | | | - | - | - | - | - | - |
| Paid Time Off | 2 | 1 | 50% | 2% | 100% | 100% | 100% | 100% | 100% | | | | | | | 7.0 | 1.0 | 7.0 | 7.0 | 7.0 | 0.1 |
| Health Insurance | 2 | 0 | 0% | 0% | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other Benefits | 2 | 0 | 0% | 0% | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |

| | | | | | | | | | | | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--------|--------|--------|--------|--------|--|
| Worker's Compensation (amount per \$100 wages) | | | | | | | | | | | | | | | | \$3.21 | \$3.21 | \$0.87 | \$4.12 | \$4.12 | |
| State Unemployment Security Tax Rate | | | | | | | | | | | | | | | | 1.27% | 0.36% | 0.34% | 0.96% | 0.36% | |

¹Weighted averages are weighted by reported staff for each employment type (full-time and part-time).

²Holidays and paid time off represent days per year; health insurance and other benefits represent the monthly employer-paid premiums (excluding employee contributions).

³The effective benefit level is calculated by multiplying the weighted average (without outliers) benefit level by the "% of Staff who Have Access" and by the "% of Staff Participating" for health insurance and other benefits, or by the "% of Staff who Have Access" by the "% of Staff Eligible" for holidays and paid time off.

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Administration and Program Support Costs - Case Management & Consulting Agencies

| Admin. (All Respondents) | Admin. (Respondents <50%) | Prog. Support (All Respondents) | Prog. Support (Respondents <50%) |
|--------------------------|---------------------------|---------------------------------|----------------------------------|
|--------------------------|---------------------------|---------------------------------|----------------------------------|

Summary

| Count of Providers | 13 | 12 | 14 | 14 |
|--|--------------|--------------|--------------|--------------|
| Program revenues | \$25,515,908 | \$25,156,820 | \$26,988,953 | \$26,988,953 |
| Median rate (excluding Gross Receipts Tax) | 12.4% | 12.2% | 5.7% | 5.7% |
| Weighted average rate (excluding Gross Receipts Tax) | 12.2% | 11.6% | 7.5% | 7.5% |
| Median Gross Receipts Tax rate | 7.6% | 7.6% | | |
| Weighted average Gross Receipts Tax (GRT) rate | 10.3% | 10.2% | | |

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| | Admin. (All Respondents) | Admin. (Respondents <50%) | Prog. Support (All Respondents) | Prog. Support (Respondents <50%) |
|--|---------------------------------|-------------------------------------|--|--|
| Staffing Costs | | | | |
| Wages | \$1,270,879 | \$972,227 | \$1,018,971 | \$1,018,971 |
| Payroll taxes and benefits | \$108,278 | \$92,565 | \$189,190 | \$189,190 |
| Subtotal - Staffing Costs | \$1,379,157 | \$1,064,792 | \$1,208,161 | \$1,208,161 |
| Benefits Rate | 8.5% | 9.5% | 18.6% | 18.6% |
| Other Operating Costs | | | | |
| <i>Facility Expenses Supporting Administrative/ Program Support/ Other Functions</i> | | | | |
| Facility rent/mortgage/depreciation | \$366,669 | \$307,031 | \$202,605 | \$188,270 |
| Facility repairs and modifications | \$57,009 | \$52,150 | \$7,081 | \$6,481 |
| Facility maintenance/janitorial/landscaping/snow removal | \$43,214 | \$35,564 | \$16,022 | \$12,422 |
| Facility utilities/telecommunications/etc. | \$108,096 | \$93,299 | \$93,192 | \$74,000 |
| <i>Other Service-Specific Expenses</i> | | | | |
| Equipment and software for remote support and telehealth services | \$0 | \$0 | \$41,318 | \$37,111 |
| <i>Travel Expenses</i> | | | | |
| Agency owned/leased vehicle expenses | \$78,691 | \$55,067 | \$166,711 | \$161,783 |
| Reimbursement for use of staff personal vehicles | \$0 | \$0 | \$2,777 | \$2,777 |
| Other travel related expenses (e.g., airfare for out of state travel) | \$122,033 | \$122,033 | \$31,221 | \$30,873 |
| <i>Taxes, Interest, and Insurance</i> | | | | |
| New Mexico Gross Receipts Taxes (GRT) | \$2,873,125 | \$2,190,068 | \$0 | \$0 |
| Other taxes (exclude payroll taxes and personal income taxes) | \$77,197 | \$48,670 | \$0 | \$0 |
| Interest expense (non-mortgage and non-vehicle) | \$3,974 | \$3,954 | \$0 | \$0 |
| All general insurance (exclude vehicle insurance and staff benefits) | \$419,204 | \$368,327 | \$0 | \$0 |

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| | Admin. (All Respondents) | Admin. (Respondents <50%) | Prog. Support (All Respondents) | Prog. Support (Respondents <50%) |
|--|---------------------------------|-------------------------------------|--|--|
| <i>All Other Operating Expenses</i> | | | | |
| Licensing/certification/accreditation fees | \$14,992 | \$10,608 | \$3,715 | \$100 |
| Hiring expenses (e.g., advertising, background checks, placement fees, etc.) | \$86,097 | \$83,198 | \$5,239 | \$2,829 |
| Training Expense (e.g., fees and materials; exclude staff payroll costs) | \$43,989 | \$13,322 | \$22,704 | \$20,295 |
| Office equipment and furniture | \$18,317 | \$15,326 | \$5,670 | \$5,408 |
| Information technology expense (e.g., computers and software) | \$114,705 | \$100,824 | \$49,718 | \$9,387 |
| Office supplies (include postage) | \$116,697 | \$107,831 | \$34,836 | \$21,851 |
| Advertising | \$22,556 | \$21,978 | \$13,554 | \$11,819 |
| Dues and subscriptions | \$30,160 | \$13,373 | \$14,392 | \$6,062 |
| Professional consulting - legal/accounting/payroll processing fees/etc. | \$234,195 | \$164,439 | \$25,754 | \$10,321 |
| Staff immunizations | \$108 | \$108 | \$0 | \$0 |
| Personal protective equipment | \$2,026 | \$1,976 | \$0 | \$0 |
| Allocated corporate office overhead | \$150,375 | \$150,375 | \$138,752 | \$138,752 |
| All Other Expenses | \$143,650 | \$86,092 | \$62,193 | \$62,193 |
| Subtotal - Other Operating Costs | \$5,127,078 | \$4,045,614 | \$937,454 | \$802,734 |
| Grand Total | \$6,506,236 | \$5,110,406 | \$2,145,616 | \$2,010,895 |

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Case Management (Developmental Disabilities Waiver)

| | | Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers |
|---|-------|------------------------|-------------------------|--------|---------------------------------|----------------------------------|
| Responding providers | 11 | | | | | |
| Number of individuals receiving Case Management | 5,021 | | | | | |

Service Design and Caseloads

| | | | | | | |
|--|--|-------|------|------|------|------|
| Average number of case management contacts per individual per year | | 232.5 | 35.8 | 12.0 | 59.3 | 29.9 |
| Of these, how many are face-to-face contacts in the individual's home? | | 57.3 | 8.6 | 10.0 | 15.3 | 8.0 |
| Average current caseload per Case Manager (on an FTE basis) | | 23.9 | 23.9 | 23.5 | 24.3 | 24.3 |
| Average number of hours (direct and indirect) Case Managers provide per individual case, per month | | 6 | 6 | 7 | 6 | 6 |

Mileage

| | | | | | | |
|--|--|-----|-----|-----|-----|-----|
| Average miles driven per week per staff to travel between service visits | | 284 | 284 | 294 | 276 | 276 |
| Average miles driven per week per staff to transport individuals | | 300 | 300 | 300 | 300 | 300 |

Office Space and Technology Funding

| | | | | | | |
|---|-----|--|--|--|--|--|
| Percent of agencies that provide dedicated office space to Case Managers | 82% | | | | | |
| Percent of agencies that fund technology for Case Managers (e.g., laptops, cell phones, etc.) | 45% | | | | | |

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Consultant Services (Mi Via Waiver)

| Average w/ Outliers | Average w/o Outliers | Median | Weighted Avg. w/ Outliers | Weighted Avg. w/o Outliers |
|------------------------|-------------------------|--------|---------------------------------|----------------------------------|
|------------------------|-------------------------|--------|---------------------------------|----------------------------------|

| | | |
|---|-------|--|
| Responding providers | 13 | |
| Number of individuals receiving Consultant Services | 3,876 | |

Service Design and Caseloads

| | | | | | |
|--|---------|------|------|---------|------|
| Average number of Consultant contacts per individual per year | 2,545.0 | 25.1 | 12.0 | 5,795.1 | 22.0 |
| Of these, how many are face-to-face contacts in the individual's home? | 641.2 | 11.7 | 12.0 | 1,453.6 | 11.3 |
| Average current caseload per Consultant (on an FTE basis) | 27.8 | 30.0 | 30.0 | 31.7 | 31.7 |
| Average number of hours (direct and indirect) Consultants provide per individual case, per month | 7 | 4 | 4 | 6 | 4 |

Mileage

| | | | | | |
|--|-------|-----|-----|-------|-----|
| Average miles driven per week per staff to travel between service visits | 4,632 | 148 | 150 | 8,999 | 211 |
| Average miles driven per week per staff to transport individuals | - | - | - | | |

Office Space and Technology Funding

| | | |
|---|-----|--|
| Percent of agencies that provide dedicated office space to Consultants | 92% | |
| Percent of agencies that fund technology for Consultants (e.g., laptops, cell phones, etc.) | 38% | |