



Soaring To New Heights
Doing Something Different
Sometimes Difficult
- BUT -
G A I N I N G
Confidence & Abilities
Enjoyment & Challenge
REALIZATION OF DREAMS

T R A N S F O R M A T I O N !

PERSON-DIRECTED HOME LIVING OPTIONS HANDBOOK *for* **Individuals, Their Families & Support Network Teams**

"Dreams are the seed of change. Nothing ever grows without a seed
and - Nothing ever changes without a DREAM"

- Debby Boone

Developed by

Family Voice of Lanark County

an affiliate of Family Alliance Ontario (FAO)

in collaboration and with support from

Lanark County Support Services

Person-Directed Home Living Options Handbook

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It is our hope that our united efforts will assist, inspire and facilitate conversation → leading to concrete action → positive change for individuals, their families, support network teams and others who may be interested in creative thinking → resulting in meaningful and exciting changes for individuals with developmental disabilities.

FAMILY VOICE OF LANARK COUNTY can be reached by email at familyvoiceoflanarkcounty@gmail.com or by leaving a message at **613-283-2297 ext 48**. As a result of receiving funding, a Web Site is in the process of being developed.

FAMILY ALLIANCE ONTARIO (FAO), our provincial affiliate, is a family-based not-for-profit organization. It is a provincial alliance of citizens that offers knowledge, tools and networking opportunities to individuals with disabilities and their families. **FAO** promotes valued relationships, choice and control in lives and meaningful contribution and participation in communities. Contact www.family-alliance.com for additional information and/or membership.

“If everyone moves forward together, then success takes care of itself.”

- Henry Ford

BACKGROUND, HISTORY, PURPOSE

FAMILY VOICE OF LANARK COUNTY

Family Voice of Lanark County was officially organized in 2007 by parents who lived in Lanark County and who had sons and daughters with developmental disabilities. One of the main purposes was to unite families who shared the common goal of creating a better quality of life for their children. Information sessions and resources were provided to families to raise awareness of “what can be available” and not just what was “currently offered” in the county and province.

Sessions were provided on a wide range of topics, e.g. Inclusion from Pre-School to High School to Life in the Community, Individualized Funding, Disability-Related Taxation Information, Creative Living Options, and Wills/Trusts/Estate Planning. Guest Speakers who were invited to speak to families included John O’Brien (Thinking of the Future with Courage), Norman Kunc (Pondering the Possible), Marilyn Dulmage (Inclusive Education), Beth French & Noreene Adam (Individualized Funding - Making it a Reality - Making It Work), Donna Neff, Neff Law Office Ottawa (Wills and Estate Planning), Bank of Montreal (BMO) (RDSP Information), etc. Members of Family Voice also attended Conferences organized by Community Living Ontario, Family Alliance Ontario, and Ontario Independent Facilitator Network (OIFN). Presentations/Briefs were submitted on behalf of Family Voice regarding the Transformation of Developmental Services “Bill 77” in 2008 and to the Select Committee on Developmental Services in 2014. (Additional information is available on the internet.)

The focus of Family Voice of Lanark County is to provide a forum for families to connect with each other, share successes, express concerns and act together to ensure the best possible future outcome for their children. Family Voice of Lanark County provides information and/or connects individuals and their families to resources available in the province from groups/organizations/coalitions, e.g. Family Alliance Ontario (FAO), People First Ontario, Individualized Funding Coalition of Ontario (IFCO), Community Living Ontario (CLO), Ontario Independent Facilitators Network (OIFN), Special Needs Planning Group, The P4P Planning Network, MCCSS Housing Task Force (Facebook), or PLAN (Planned Lifetime Advocacy Network), etc.

In 2018, MCCSS offered funding through an application process to Family Support Networks. The co-founders of Family Voice of Lanark County (Joyce Rivington & Cora Nolan) approached the Director of LCSS (Debi McEwen) to request support in their funding application.

The purpose and goals of Family Voice of Lanark County are to:

- Facilitate opening lines of communication with like-minded individuals on a regular basis
- Provide current information on issues of importance and interest
- Share success stories and experiences
- Be an accessible forum to express ideas and concerns
- Encourage “Net-working” with other family groups and organizations
- Increase capacity to reach out and provide information
- Empower and engage individuals, families and personal support networks teams
- Promote better outcomes, accountability, self-determination, access, choice and citizenship

“It is difficult to say what is impossible, for the dream of yesterday is the hope of today and the REALITY of tomorrow.”

- Robert H. Schuller

BACKGROUND, HISTORY & EVOLUTION OF SUPPORTS/SERVICES

LANARK COUNTY SUPPORT SERVICES (LCSS)

LCSS is a non-profit charitable Transfer Payment Agency (TPA), funded by MCCSS and sponsored by the Perth and Smiths Falls District Hospital. It provides supports and services to individuals with developmental disabilities in Almonte, Carleton Place, Perth and Smiths Falls. Since its inception in 1981, the organization has continually strived to enrich the lives of individuals in Lanark County's communities. Over the years the types of supports and services provided have evolved and grown to meet the ever-changing needs, goals and wishes of individuals and their families. Today LCSS offers a broad spectrum of options that are increasingly more person-directed, flexible and individualized, inevitably resulting in an improved quality of life.

In recent years, as a result of requests from individuals and families, LCSS has expanded into the area of providing individualized support to people who wanted to become more independent and move forward with lives by having support in a home of their own choosing. Initially, for many years, LCSS provided various types and levels of support to enable individuals to live in their own apartments. The goal has always been to assist people to acquire non-intrusive, flexible supports that best fit into their own schedules and meets their own specific lifestyle support requirements and needs.

In 2015 LCSS was one of a handful of agencies from across Ontario that was successful in acquiring funding from the Developmental Services Housing Task Force Project. As a result of this funding, LCSS was able to facilitate support for four individuals to live in their own apartments, in their choice of community, with the individualized person-directed support that each person required to live as independently as possible on their own.

Transformation in the Ministry of Children, Community and Social Services Developmental Services sector has led individuals and their families to request assistance from LCSS to help them create a home of "choice" for their adult children. The focus of each approach is to promote personal growth and independence while providing the level of support and intervention required, and at the same time appreciate and encourage the ongoing input and involvement of families and each individual's support network. In 2017 LCSS was successful in acquiring funding for two individuals with higher and more complex needs to have a home of their own in the Carleton Place area. Their families and support network teams were extensively involved in the initial steps by assisting to create the opportunity. They continue to play a key role in ongoing continued success.

LCSS is an organization that is open to change and innovation. Administration and staff welcome new ideas, creativity and opportunities that continue to expand choices that greatly surpass limits that previously existed. Success is achieved when everyone (individuals/families/support staff/administration) works together to help create a lifestyle of choice that promotes citizenship values, ongoing growth, safety, sustainability and personal satisfaction.

"We keep moving forward, opening new doors, and doing new things, because we're curious and curiosity keeps leading us down new paths."

- Walt Disney

PURPOSE OF HANDBOOK

This Handbook is a resource to assist individuals, families, support network teams, LCSS staff and other like-minded individuals as follows:

- Initiate discussions with regards to home options that exist in our County and in the Province
- Create a starting point or source of creative and alternative thinking that results in moving forward with new opportunities, ideas and continued growth
- Emphasize the importance of collaboration, teamwork and support from like-minded individuals
- Promote improvement of self-determination, choice and quality of life outcomes for individuals with developmental disabilities
- Identify and discuss safeguards, accountability mechanisms and long-term sustainability
- Be active participants and team members with like-minded families, staff and organizations committed to positive and progressive change occurring in the lives of individuals with developmental disabilities
- Provide sources of information and resources, acquire more information and gain knowledge
- Stimulate conversation, cultivate ideas, provide awareness of options that result in ACTION STEPS leading to real CHANGE
- Assist and facilitate access to information, knowledge, opportunities, and options for individuals to create a “NEW STORY”* of inclusion in all aspects of their lives including a home of their own choice

* John Lord has written extensively about what he calls the New Story, a new paradigm approach to supporting vulnerable citizens in the community. The idea is to create options for people...to experience creative supports in community and full citizenship...” (John Lord is the founder of the Centre for Community Based Research, 1982 in Kitchener Ontario)

*“The Future is not something we enter.
The Future is something we create.”*

- Leonard Sweet

STEP 1: GETTING STARTED – Acquire Ideas & Formulate Your Vision

(Refer to Worksheet #1)

Have you ever thought about helping your son or daughter start to think and/or plan for their future? How could you help them have more independence, choice and control of their life? What type of home and support will they need when you are no longer able? What can you do now to ensure that their life remains stable and does not fall apart? How can you ensure that they will continue to have people in their lives who love and care about them?

“The first step toward getting somewhere is to decide that you are not going to stay where you are.”

– J.P. Morgan

The **First Step** is being informed, doing some research and investigating what type of approaches and solutions have been created/developed for home living options and opportunities. It is helpful and motivating to have information about what has already been initiated and/or designed by other families and/or organizations across the province. We have included a list of resources and information (pg. 38) which could be beneficial in assisting you to acquire ideas and formulate a clear **VISION** of the characteristics and components of a ‘Home Living Approach’ that would be a “best fit” in each individual situation.

“The future belongs to those who see possibilities before they become obvious.”

– John Sculley

STEP 2: CLARIFYING YOUR VISION – How Do You Figure it Out?

(Refer to Worksheets #2,3,4,5)

A **VISION** of a home for an individual with a developmental disability should have the same basic characteristics as anyone of us would want. When an individual has a developmental disability, they may require a range of varied supports to assist/enable them to live as independently as possible in a home environment of their own choosing. Identifying personal tastes, culture, preferred home activities and details of the **type** and **level** of support an individual requires to live as safe, comfortable and independently as possible are some of the key components required to assist in clarifying a person’s vision of a home of their own. Homes come in various shapes and sizes which can include but are not limited to a single family dwelling, sharing the dwelling with someone else, a condo, an apartment, a suite (several rooms) in a home, etc. “**Clarifying Your Vision**” should include specifics, e.g. type/location/details of the home (building) and specific details of support required, i.e. **WHEN?** (during what parts/times of the weekday/weekend); **WHERE?** (preferred location); **WHAT?** (will the supports entail, i.e. level/type of support); **WHO?** (will provide/monitor supports); **HOW?** (will the supports be acquired/paid); **WHY?** (is it important).

“I can teach anybody how to get what they want out of life. The problem is I can’t find anybody who can tell me what they want.”

– Mark Twain

Individuals, their families and their support network are the KEY to unlocking the VISION of the home that an individual needs and wants.

“There is no one-size-fits-all solution to housing. The challenge for the government isn’t just about finding more supports. It’s about finding the right kind of supports for each individual.”

- Dr. Helena Jaczek, (former) Minister of Community & Social Services

Identifying and providing details of the types and amount of support your son/daughter requires during the day/evening/overnight is a critical part of **“homing in on the solution.”*** Doing research relating to what types of individualized home opportunities exist already is extremely helpful. It provides ideas and information that can assist in identifying what is needed and what is important. Other families and/or family organizations are valuable resources. Acquiring ideas, information and details about other approaches is an essential part of the process.

* **“homing in on the solution”** The P4P Planning Network

“Ideas can be life changing. Sometimes all you need to open the door is just one more good idea.”

- Jim Rohn

Every person’s **idea** of “home” should be unique to their own taste, comfort, characteristics and culture. Currently in Lanark County there are a variety of individualized home options with varying degrees of support, for example:

- separate apartments in the community with varying support options (customized to the individual’s requirements and needs)
- a home with separate and shared spaces for individuals with and without disabilities
- live in support 24/7 - support from tenants who have their own separate apartment
- supported independent living (SIL) or “enhanced” (SIL) which is based on the individual’s own schedules, choices and amount/level of support they require (this is different from “traditional SIL” as the individual directs their type/level of support)
- “House” discretionary trusts (securing a home investment for the future)
- “Life-Lease” – shared ownership of a home with a non profit organization and individuals (and/or their families)

As a result of the innovation, creativity and action of individuals and families and requests for proposals for more innovative home options (MCSS Housing Task Force) a variety of examples now exist and have proven successful. We have more choices and opportunities. It is essential to continue to build on the examples, ideas and successes of others.

PARTNERS for PLANNING (The P4P Planning Network) has prepared a digital online booklet of **“Options for Home”** which is a summary of innovative solutions that received funding from the Ministry of Community and Social Services Housing Task Force (LCSS’ example is included in the digital booklet).

“Knowledge is Power.”

- Francis Bacon

NOTE: The following Housing Options and Support Options are just an example – they are NOT meant to limit your VISION or INDIVIDUALITY with respect to alternative ideas and creativity.

Housing Options				Support Options		
I want to live with:	I want to live in:	The property I live in is owned by:	My home life is directed by:	My support is provided by:	My level of Support needed is:	My Support is Funded by:
* Myself	* House	* Me	* Me	* Assistive Technology	* Case Management Only	* Me
* Family	* Condo	* My Family	* My Family	* My Family and/or Friends	* Funding Brokerage	* My Family
* Roommate	* Apartment	* Another Family	* Another Family	* Another Family	* Financial Accounting Support	* Passport Funding
* Other (describe)	* Family Home	* Roommate	* Roommate	* Roommate	* Part Time Support (# of hrs & time period(s))	* Agency Budget For Residential Support
	* Home with Separate Suite	* Agency	* Agency	* Volunteers		* Agency
	* My community of choice	* Other (describe)	* Other (describe)	* Neighbours	* Full Time 24/7	* Individual Budget
	* Other (describe)			* Paid Staff Hired by myself and/or Support Network	* Other (describe)	* Individual Home Funding Agreement
				* Agency Staff Hired by Agency		* Other (describe)
				* Other (describe)	* Could be a combination	

HOUSING OPTIONS

* A Family Home could be a MCCSS funded “Family Home Program.” It could also be a private arrangement in which an individual chooses to live with another individual who may/may not provide some of the support required.

SUPPORT/FUNDING OPTIONS

* Individual Budget - a budget that is determined by “direct” funding from the Ministry allocated to the person annually, i.e. “Individualized Funding.” This type of funding is flexible, portable and directed by the person. Funding is attached to the person. Additional information: www.johnlord.net/category/publication/individualized-funding

* Individualized Home Funding Agreement - a budget that is in the “base budget” of an agency but is allocated to the person by the Agency for individualized support in their home option (not a group home model).

STEP 3: TAKING ACTION/TEAM BUILDING – A Personal Support Circle/ Network

(Refer to Worksheets #6,7)

“If you love someone put their name in a CIRCLE not a heart, a heart can be broken but a CIRCLE goes on forever.”

- Lessons learned in Life

The importance of an individual with a developmental disability having a “Personal Support Circle/ Network” in place cannot be overstated. A valuable resource relating to the “**Building of Personal Support Networks**” was developed in March 2009 by **Community Living British Columbia**. The Resource Booklet provides valuable information regarding the essential role of a support network in the life of an individual with a developmental disability. “Members of the support “circle” network are not paid. People who participate in a person’s support Circle/Network are friends and/or family who are there for us in times of trouble, sorrow and celebration. Those friends take an interest in us and our lives because we share common threads that bind us to one another... They are people we value in our lives who help us achieve our dreams or lend a hand when we are in need”.

“**CREATING HOUSING CHOICES For People With Developmental Disabilities in Ontario**” Resource Guide April 2006, provides an overview of Personal Networks and how the model works:

- “...a group of committed men and women who join in a relationship with the individual with disability and with each other”
- “The network bridges the gap between living on the edge of community and being a full and active participant in that community...”
- “The model is based on a future planning process developed by **PLAN Canada BC** for people with disabilities which assists in ensuring they have a safe and secure future...”
- “...members of a Personal Network offer support, monitoring... they may also be involved in assisting with finances, securing/managing funding for support needs”
- “Members of the Network may also act as a resource for trustees and guardians and provide links to others in the community”.

Additional Benefits of a Support Circle/Network include: Creating a ‘safety net’; Advocacy; Securing/Monitoring supports/services; forum for network members to support one another; acting as a resource for executors/trustees; acting as a representative/support for decision-making; spending time with the person at the centre of the network”.

The Resource Guide also provides an overview of **MicroBoards** - Some individuals/families/support networks have chosen to form a “**MicroBoard**” (an incorporated legal, non-profit organization) which has minimum membership and financial accountability (provincial/federal).

“A Microboard is a small (micro) group of committed family and friends (a minimum of 5 people) who join together with the individual to create a non-profit society (board). Members of the Microboard are committed to knowing a person, supporting that person and having a volunteer (unpaid) reciprocal relationship with that person. Some Microboards become the entity through which paid services and supports are provided”.

Moving forward takes momentum - requires **ACTION** from everyone on an individual's support circle/network team:

T	Together
E	Everyone
A	Achieves
M	More

- Author Unknown

STEP 4: PERSON-DIRECTED PLANNING – Putting All The Pieces Together

(Refer to Worksheet # 8,9,10,11,12,13,14,15)

By completing **Steps 1** and **Step 2** you will have a more concrete **VISION** formulated regarding a future home opportunity. **Step 3** provides the advantage of having additional support now and in the future from your son/daughter's **Support Circle Network Team**. These steps provide the foundation to move forward with a Person-Directed Plan for a Creative Home Option. The completed Plan will include information from previous **Steps 1 to 3** and the following **Steps 4 to 7** in our Handbook. **Step 8** contains individual worksheets to facilitate completing **Steps 1 to 7**.

“Person-Directed Planning is an ongoing process that begins with listening in order to understand what it is that you want in your life. It builds on your dreams, strengths and capabilities. It is focussed on the development of relationships as well as on ways you can access community resources to support a good life. Understanding what is of value and how you can participate in your community is key to the process – things like how you spend your day.”

“Person-Directed Plans can be short or long. They can have pictures, words or both. You can do it yourself or get someone to help you. You can choose because the plan begins with you.”

- from “Creating a Good Life in Community – A Guide on Person-Directed Planning designed by the “Individualized Funding Coalition of Ontario”, copies available from the Ministry of Children, Community & Social Services <http://www.mcscs.gov.on.ca>

STEP 5: CHARTING THE PATH – Defining Important Details for the PLAN

*“If you don’t know exactly WHERE you’re going,
HOW will you know when you get there ?”*

- Steve Maraboli, Life, the Truth, and Being Free

Once the **VISION** has been clarified, it will give more momentum to move forward. Start the Person-Directed Home Plan with a “Vision Statement” - a short brief summary of the **“clarified vision of your home for the future.”**

(Refer to Worksheet # 8)

It is important to provide a complete picture of the **PERSON** in their **PLAN** - a snapshot of their journey to date by identifying their **“Personal Story/History & Background”**. **WHAT** has brought them to the stage in life that they are seriously thinking and/or ready to start to create a home of their own choosing? Identify **WHAT** the reason is to move forward with a **PLAN** for their own home opportunity, i.e. **“Current Situation.”**

(Refer to Worksheet # 8)

“Person-Directed Planning” is highly consistent with the emphasis on self-determination and the achievement of personal outcomes for people with developmental disabilities. Through an action-oriented approach to planning, people with disabilities are the architects and directors of their plan. Other people in their networks or circles of support participate in the planning and assist these people to think about their dreams, goals and supports needed.” (from **A Facilitator’s Guide to Person-Directed Planning 2011**).

“Nothing about ME without ME”

- Valerie Billingham, session at Salzburg Global Seminar 1998

The above quote has become a rallying cry of many shared decision-making advocates including our “PEOPLE FIRST” organization of Self Advocates.

A sample worksheet has been included which contains a variety of questions that can be utilized with an individual to assist in ensuring that a person’s home will be a place that they love. Pictures can also be a substitute for verbal responses.

(Refer to Worksheet # 9)

*“The journey of life is shaped by the questions we ask.
Questions give us a path to walk down and direction to follow.
They create boundaries for us to operate in.”*

- Author Unknown

Note: Some individuals will be able to answer verbally, others may require support from their support circle and people who know them best.

IDENTIFYING PERSONAL STRENGTHS

(Refer to Worksheet #10 a & b)

Knowing **WHAT** a person's personal strengths are can help a lot in making a new home approach successful. **HOW** can their strengths benefit them in their home of choice?

A person's biggest personal strength is what is easy for them or comes natural. A person may need assistance to define their own personal strengths/talents and attributes. It is important to identify a person's strengths and how they will contribute to an individualized person-directed home environment. Some examples of typical strengths could include but are not limited to: personality characteristics (curious, determined, caring, energetic, focussed, organized, social, happy, confident, entertaining, outgoing, inspiring); gifts/talents (musical, friendly, skills in specific areas); attributes (what is special or unique to the individual that attracts others to them). An individual's Personal Support/Circle Team can play a role in assisting in this process.

*"Success is achieved by developing our strengths,
not eliminating our weaknesses."*

- Marilyn Vos Savant

IDENTIFYING A PERSON'S NEEDS - WHAT THE PERSON NEEDS TO BE SUCCESSFUL

(Refer to Worksheet # 11 a & b)

An individualized person-directed approach for supports in a person's home should be responsive to their needs and flexible (not restrictive) of a normal lifestyle, i.e. supports fit into their schedule(s)/routines and time preferences. Support provided should enable the individual to make choices about the types of support they receive. Support needs can vary with each individual. Some examples of areas of need are: physical, medical, communication, personal care, social opportunities/facilitation, recreational/travel experiences, meal preparation/cooking, cleaning/laundry, financial (budgeting/banking), transportation, entertaining, developing friendships, etc.

An individual's Personal Support/Circle Team can play a role in assisting in identifying

Areas of Need

- **WHAT** can be done and/or is required?
- **WHAT** action needs to be taken?
- **WHAT** safeguards need to be in place?
- **WHO** is responsible to ensure action is taken?
- **WHAT** is the expected time line for completion? (If applicable/it could be an ongoing need)

When the type of home opportunity has become concrete, it becomes more evident **WHAT TYPES/ LEVELS** of individualized supports are required in the home environment and **HOW** they can be accommodated. Identifying **Strengths** and **Support Needs required to be successful** are essential components of an individual's **PERSON-DIRECTED HOME OPPORTUNITY PLAN**.

"...I work hard to improve my weaknesses and build on my strengths."

- Antoine Griezmann

STEP 6: THE BUDGET – WHAT is required to determine COST of THE PLAN?

(Refer to Worksheet # 12 a & b)

The cost for each individual's **PLAN** will be unique to each individual's needs and choices of the type of home living situation that meets their preferences, needs and requirements for support. The budget will be comprised of two parts:

1. **The cost of the "Home" (bricks and mortar)** - rent/mortgage, utilities, furnishings, etc.
2. **The cost of the "Supports"** to enable an individual to live as independently as possible in their own home environment.

"Support Options" are key factors in determining the **"Cost Factors"** of your own individualized home option and opportunity. Across the province, it is evident that traditional residential models are no longer the option of first choice for individuals and their families.

The creation of the following options in Lanark County were largely made possible as a result of requests and/or pressure for change from individuals and families:

INDIVIDUAL/FAMILY INITIATED MODEL – the approach was based on a Person-Directed Plan and was initiated by families for their adult children. It enables the individuals to live in a home of their own choosing. The home investment is protected through **Will/Estate Planning**. The supports are customized to fit the individual needs of the person. This specific type of home opportunity involved the family investing in a home, organizing a variety of supports and engaging/involving **PERSONAL SUPPORT CIRCLE/NETWORK TEAMS** and/or **MICROBOARDS**. Funding for this type of model is **"individualized funding"** attached to the individual. Additional resource information is available in the resource section of this handbook.

LANARK COUNTY SUPPORT SERVICES (LCSS) has responded to individuals and families by providing a variety of home living options/opportunities which are outside the scope of traditional models. Currently, three different approaches have been developed as follows:

Facilitator Support Tenant Model – initially received funding through application to the MCSS Housing Task Force – it provides support from a tenant (overnight emergency support) and then each individual receives support in keeping with their individualized needs/routines according to their direction/preferences. The individual and their family/support circle network team were involved in planning.

Flexible/person-directed apartment living support – This approach is different than the traditional SIL (supported independent living and/or enhanced supported independent living) in that supports are customized and individualized to support the type/level of support required by the person and is based on their schedule and support preferences. This model has enabled individuals who require additional support to achieve more independence to live in their own apartment. Individuals and families have played a key role in pursuing the opportunity to have supports organized around the individual's personal needs/schedules.

Home Option/Support Circle Network input/involvement – This opportunity was made available to two individuals with higher more complex needs and enabled them to live in a home in their community of choice. Their family and support circle were involved in the choice of home (which is owned by the organization) and support is person-directed according to their own individual varied needs, schedules and choices.

"Life Lease" – Has been offered by non-profit charitable organizations in the past to the senior population. It is a model of "partnership" and is becoming a feasible opportunity to individuals with developmental disabilities and their families in recent years. It provides individuals with a sense of ownership and security. The terms of a "Life Lease Agreement" will vary relating to individual situations. The non-profit organization usually holds the major share of the investment. **COMMUNITY LIVING ASSOCIATION (CLALC)** identified at it's AGM that this type of model had been made available and has proven to be successful for two to three individuals and families who chose this option.

A considerable amount of time should be spent on **Person-Directed Planning**. It is essential that the “person” be at the centre of the planning process. Individualized Person-Directed Planning represents the catalyst to move a person’s plan forward with regards to having the “home” component decision as part of their **LIFE PLAN**.

Every person will have different support requirements. Some will require 24/7 support and sometimes overnight support/supervision can be shared. Some individuals require support in the form of “check-ins” e.g. to make sure they were able to do their laundry and/or purchase groceries. There are a wide range of support needs and a wide range of ways in which support needs can be accommodated. Once the specific details have been identified, i.e. **what the person needs to be successful**, it will assist a great deal with being able to formulate a budget. In addition, the type of “home” that is chosen will also have a wide range of expenses, e.g. rent/utilities, upkeep/repairs, taxes (*taxes may be exempt if the home is under the umbrella of a non-profit organization, i.e. organization owns the home*). It is important to explore possibilities and then decide exactly what approach/model or variation thereof will be the “**right fit**.”

There are many resources that can be used to assist individuals/families and their support circle/networks on how to create a person-directed home plan. Some provide planning methods and others provide general books, stories and guidance. Some individuals have been able to access skilled “**Independent Facilitators**” who are able to help people plan and think about their future. These individuals are independent of local service providers. Information relating to resources is available on the internet and we have also included information in the “**Resource Section**” of our handbook. Listening and knowing the person well is a critical part of ensuring that the person is at the forefront of planning and that the right choices are made with regards to all components of their lives including determining the type and approach that will enable them to have a home of their own preference/choice.

“If you really know what you want and how to get there, then everything else really falls into place.”

– Marlen Esparza

Prior to completing the **Budget Worksheets (#12 a & b)**, it is essential to know and understand the approach and model of home that is the preferred choice. The Worksheets are designed to provide an overview of possible expenses. Once you have identified the possible cost for both the “**Home Option**” and the “**Support Needs**” it will provide a clearer picture of costs. As with anything that we decide to purchase in life, one doesn’t always accept the initial cost. Explore ways of reducing costs in whatever home approach has been chosen. This is another example of how a support circle network team can assist in finding/developing a financially feasible solution.

STEP 7: YOUR HOME – A HOME that is Right for YOU

(Refer to Worksheet # 13, 15)

If a decision has been made through researching options and utilizing person-directed planning processes on the type of approach and/or model of home that is the right choice and if the budget has been prepared outlining the probable costs of supports and services required to meet the needs of an individual then the **VISION** will have become a more concrete **REALITY**.

Some of the following questions have been adapted and/or changed/modified from

“**Alternative Housing Options for Individuals with Disabilities**”, a project of the **Center for Independent Futures, Evanston IL** and will assist individuals, their families/support circle/network teams in the process of knowing that they are ready to take necessary **ACTION** to assist the individual to move their **PLAN** forward. **Worksheet # 15** provides a “**Moving Forward**” chart/outline to assist in identifying progress made, success, ongoing action items to keep the **PLAN** moving forward.

QUESTIONS for Consideration – ARE YOU READY?

1. Does the housing approach/model already exist? Yes No
2. If it does exist, is it available? Yes No
3. If not, am I willing to help create a housing solution that will meet my son/daughter’s needs and desires? Yes No
4. Am I/we willing to take necessary steps for my son/daughter to be ready for a more independent living opportunity? Yes No
5. Am I/we willing and able to commit the time required to assist in creating a new home opportunity for my son/daughter? Yes No
6. Do I/we have financial resources available that could be utilized for the “home” (bricks and mortar) part of the Home Plan? Yes No
7. Am I willing and/or able to commit time and the knowledge that I have gained regarding my son/daughter to realize the home opportunity venture? Yes No
8. Am I willing to reach out to others, i.e. people who could participate in my son/daughter’s personal support circle/network, family support networks/organizations, and/or others as needed for advice/support? Yes No
9. Would I be willing to partner with another family or would my son/daughter prefer to have his/her own space? Yes No
10. Do I know other families who share the same goals and visions who I could share ideas, resources, opportunities with? Yes No

11. Have I/we considered the following:

HOW will financial administration of the funding be maintained?

WHO will be responsible for the financial administration of the funding?

WHO will ensure quality of life monitoring/ongoing safety/security measures are in place?

WHO will be responsible for ensuring necessary changes are made relating to changing needs of my son/daughter

HOW will support be acquired/hired?

WHO will be responsible for ongoing sustainability of your son/daughter's home of choice?

HAVE safeguards to ensure future quality of life/security/well-being been established?

“Life is inherently risky. There is only one big risk you should avoid at all costs and that is the risk of doing nothing.”

– Denis Waitly

CONSIDER THE FOLLOWING RISKS:

WHAT IF something unexpected occurred tomorrow – you were no longer able to assist and/or be part of your son/daughter's life? *(use additional pages as required)*

DESCRIBE the picture you have in your mind of what their life from that day forward would look like: _____

IS THERE anything you could do today that would improve your son/daughter's life when you are no longer in the picture? *(identify)* _____

DESCRIBE what you would like your son/daughter's life to look like when you are no longer in the picture: _____

STEP 8: TAKING ACTION WORKSHEETS (Worksheets #1 – 15)



“VISION is not enough, it MUST be combined with VENTURE. It is not enough to stare up the STEPS, we must STEP UP THE STAIRS”

-Vaclav Havel

- STEP 7: YOUR HOME – A Home that is Right for YOU**
- STEP 6: THE BUDGET**
- STEP 5: CHARTING THE PATH**
- STEP 4: PERSON-DIRECTED PLANNING**
- STEP 3: TAKING ACTION/TEAM BUILDING**
- STEP 2: CLARIFYING YOUR VISION**
- STEP 1: GETTING STARTED**

WORKSHEET # 1

“We do what we have to do so we can do what we want to do.”

– Denzel Washington

GETTING STARTED – WHAT IS YOUR VISION OF “HOME”

As family members of adult children with a developmental disabilities age, the reality of mortality is something that often comes to mind. Planning ahead to ensure that the future will be safe and secure for their loved one is essential. Sometimes it is difficult to know where to start or how to start. Some individuals with developmental disabilities are able to articulate what they want very clearly – others may need assistance from those who know them best. The following questions will be a start in the process of determining how to move forward.

1. When you hear the words “my home” **WHAT** are the first things that come to your mind that are important, e.g. *what are all the things that are in your home that you like for yourself/son or daughter?*
– **WHAT** makes a “home” a “home”?

Write down the first things that come into your mind – it could be paint colours/decorations, it could be things that you do in your home that are important, it could be the location of your home, e.g. the community you live in or the neighbours, etc., it could be specific things that you enjoy in or about your home or people you live with, etc. If parents and/or family members participate in this process for themselves, it will provide a basis of common things that are essential about a person’s home.

2. **WHAT** are things about a “home” that would be important and/or essential for your son/daughter who has a developmental disability to have in their “home”?

Some individuals with a developmental disability may require assistance to complete this information. For those who are non-verbal, individuals who know them best will be able to assist in this process.

3. **WHY** is it important to move forward the **VISION** of a **HOME PLAN** for your son or daughter?

WORKSHEET # 2

CLARIFYING YOUR VISION – HOME OPTIONS – TYPE/MODEL/APPROACH

On Page 9 of the Handbook, there is a chart that provides examples of “Home Options” and “Support Options.” The following information is essential:

WHO? Would your son/daughter prefer to live with:

- By themselves
- With family/extended family
- With a roommate
- With an individual they know well
- Other (specify) _____

WHAT? Type of Home Environment

- Own their home
- Condo
- Apartment
- Separate Suite in Family Home
- Life Lease (family/individual has a share in home)
- Other (specify) _____

WHERE? (location) _____

WHO? Owns the property

- The person with a developmental disability
- Property is in a “Trust”
- Individual’s family owns home
- Roommate owns home
- Agency owns home
- Life Lease
- Other (specify) _____

Additional Information?

WHAT specific option would your son/daughter choose?(describe)

WHAT specific option do you believe would meet your son/daughter’s needs best? _____

Other comments:

WORKSHEET # 3

CLARIFYING YOUR VISION – SUPPORT OPTIONS – TYPE OF SUPPORT

Does the individual require support to live in a home environment of their own?

- Yes No

WHAT TYPE OF SUPPORT is required for an individual to live in their own home environment?

(Check all that would apply to individual situation)

- Assistive Technology Family/Extended Family Another Family
 Roommate Volunteers Neighbours Paid Staff Hired by Individual
 Agency Staff Hired by Agency Other (*specify*) _____

Additional Notes/Comments/Information that you feel is important to identify:

WHAT LEVEL OF SUPPORT is needed for an individual to live in their a home environment?

(Check all that would apply to individual situation)

- Case Management (Describe) _____ Funding Brokerage _____
 Financial Accounting Support Full Time 24/7
 Part Time Support (# of hrs. & time period(s)) _____
 Other (Identify) _____

WHO HIRES SUPPORT WORKERS?

- Individual/Support Circle Network Individual/Support Circle Network with Agency help
 Other (Identify) _____

Additional Notes/Comments/Information that you feel is important to identify:

WORKSHEET # 4

CLARIFYING KEY ELEMENTS IN A “GOOD LIFE”

Our HOME is our base – it is where we start our day and finish our day. There are other components to a person 's life that are essential and contribute to enjoyment in life and feeling fulfilled. The following areas are key ingredients that are essential to have and maintain in one's life: Good Health, Personal Life, Activities, Things to look forward to – Personal Growth – all of which contribute to creating a “GOOD LIFE.” In the following sections, identify things that are essential, important and/or required to ensure/maintain choice and opportunities for ongoing personal growth, happiness and fulfillment. (Use additional sheets as required)

Good Health

“When health is absent wisdom cannot reveal itself, art cannot manifest, strength cannot fight, wealth becomes useless and intelligence cannot be applied.”

– Herophilus

Write down the first things that come into YOUR mind that will ensure a healthy lifestyle in the future – this section can include but is not limited to – diet, nutrition, medical/dental appointments, prescribed medications, vitamins, exercise, etc.

Good Friends/Relationships/Social Opportunities/Experiences

“Friendship is a thing most necessary to life since without friends no one would choose to live, though possessed of all other advantages”.

– Aristotle

“Everyone should be able to pull out a calendar and see at least a few fun things scheduled in the future weeks”

– Gretchen Rubin

Write down the first things that come into YOUR mind that will ensure life has purpose and activities that contribute to the reason for getting up in the morning → things to look forward to, ongoing growth, learning and success, being with people you enjoy/like/love. Some of the things that you can identify and expand upon in this area include (but are not limited to) specific activities/hobbies, jobs/work related activities, exercise, learning and achieving new things, socializing, enjoyment, friends/family, can't live without” kind of things.

HAPPINESS & Having Things to Look Forward to in One's Life

“Having something to look forward to makes you ‘feel good’ and may also give an ‘atmosphere of growth’ to your life because the future seems bright”

– Grethen Rubin

Write down and be honest about likes and dislikes. Make sure that your recipe for a “Good Life” includes:

- Anticipation (looking forward to something exciting)
- Savoring (enjoying the moment),
- Expression (sharing your pleasure with others)
- Reflection (looking back on happy times – so take pictures)

What are the important things that create “Happiness” i.e. – things that have been experienced and/or a person wants to continue to experience, e.g. Specific People, Prize Possessions, Collections, Pictures, Favourite Clothing (style/items) Travel, Celebrations. Traditions (describe)

D r e a m s.....

NOTE:

It is essential that your son/daughter be provide with assistance as required to provide their input regarding what contributes to a “Good Life”. Assist as/how required to ensure their choice and voice is what is reflected.

WORKSHEET # 5

CLARIFYING “MEANINGFUL WEEKLY ACTIVITIES” that YOU ENJOY and WANT to include in YOUR SCHEDULE

WHAT A “MEANINGFUL DAY”* SHOULD LOOK LIKE FOR: _____
 Your Name

Fill in the days and times that already have established routines and/or activities that are important and/or required for YOU to **ENJOY** and/or **ACQUIRE/MAINTAIN** a **“GOOD LIFE”**. A **“GOOD LIFE”** should replicate components of an **“everyday/ordinary lifestyle”** e.g. job(s)/work related activities, ongoing learning, social/recreational opportunities, time to relax, time to do favourite things/hobbies etc.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
AM							
Noon							
PM							

Note: Completing a weekly schedule of established routines/activities that a person already has in their life will assist in identifying where **“gaps”** may exist that are essential in contributing to the person having **“a full meaningful and inclusive life”**.

* **Al Etmanski** – For you and your relative with a disability, **A GOOD LIFE** – www.amazon.com

* **Darcy Elks** – Darcy Elks Consulting/Workshops **“Full, Meaningful Inclusive Life”** – www.darcyelks.com

WORKSHEET # 6

WHO is on/or could be on your son/daughter’s SUPPORT NETWORK TEAM?

“Alone we can do so little, together we can do so much.”

– Helen Keller

“COMING Together is a beginning. KEEPING together is progress. WORKING together is Success.”

– Henry Ford

_____’s **SUPPORT NETWORK TEAM**
 (Name (Son/Daughter))

The following individuals have made a commitment to support _____ to ensure he/she has **“A GOOD LIFE”** now and in the **FUTURE**.

#	Name of Team Member	Relationship/Connection	Role/Type of Contribution etc.	Contact Info	Additional info
1				Phone: Email:	
2				Phone: Email:	
3				Phone: Email:	
4				Phone: Email:	
5				Phone: Email:	

As each situation is different, the role and/or type of contribution will vary. There may be more than 5 members. Members can change over time. If a member resigns, search for a replacement.

WORKSHEET # 7

ACTION PLAN: SUPPORT CIRCLE/NETWORK TEAM

“Do Stuff, be Clenched, Curious. Not waiting for inspirations’ shove or society’s kiss on your forehead. Pay attention. It’s all about paying attention. Attention is Vitality. It connects you with others. It makes you eager. STAY EAGER”.

– Susan Sontag

_____ and his/her **SUPPORT NETWORK TEAM**
 (Name (Son/Daughter))

#	ACTION ITEM	WHAT Needs to be Done	HOW is going to Accomplished – ACTION STEPS REQ'D	WHO is going to DO IT	WHEN will it be completed TIME LINE / DATE

ACTION STEPS are ongoing → IDENTIFY a few ACTION ITEMS → when TIMELINES have been met → IDENTIFY a few more ACTION ITEMS/ STEPS/TIMELINES →KEEP MOVING FORWARD.....

“ The key to success is action, and the essential in action is perseverance”.

– Sun Yat-sen

“LUCK is what happens when OPPORTUNITY meets PREPARATION.”

– Seneca

WORKSHEET # 8

CHARTING THE PATH of a PERSON-DIRECTED HOME PLAN

VISION STATEMENT – Brief Overview of decisions made from researching options and clarifying the type of home, location, person/people I want to live with me and/or near me, type of support I want and any other information that provides clarity to the person’s vision of a home of their own.

_____’s **PERSONAL STORY – HISTORY & BACKGROUND**
(Name)

Start with information about the person. As everyone is different – information should be unique and specific to each individual. Examples of what type of information that could be included in this section are: where they were born; parents/siblings/extended family; memories (pictures of important memories and/or activities; personality; favourite things/places; special celebrations/events; treasures/things they love; pets; special people in their life/special bonds; what they would like to do if they had the chance; goals/dreams)

Note: The above are ideas only – not meant to limit individuality of each person/situation)

_____’s **CURRENT SITUATION**
(Name)

(Current Situation – as it relates to thinking about the future and acquiring a home opportunity of their own choice)

Examples of information to include – Identify where they live now; what thoughts they have about the future and where they will live; things that are going on in their life now that are important; people that they need and want in their life; things that they are involved in and that they want to continue; any changes in family situation that have occurred and/or are going to occur that have brought about thoughts of moving forward with planning for their future and home; any changes that have occurred in their life, i.e. positive or challenging, etc. What was the motivating factor that led to the development of a Person-Directed Plan for an individualized home opportunity at this point in time?

Note: The above are ideas only – not meant to limit individuality of each person/situation – the information may take more than 1 page)

WORKSHEET # 9

**Important Questions to Answer to Make Sure Your New Home is
YOUR HOME – A PLACE YOU LOVE!**

WHEN you think of your HOME – what comes to your mind FIRST?

WHAT community do you want to live in? _____

WOULD you like to live alone or with someone else? _____

WHAT type of person (their personality etc.) do you prefer? _____

WHAT possessions (colours/pictures etc.) would you like in your home?

WHAT leisure activities do you like to participate in your home? _____

WHAT type of activities would you like to be involved in at home e.g. making meals/cooking, taking care of clothes, having visitors etc? _____

WHAT new skills would you like to learn in your new home? _____

WHAT type of relationship would you like to have with neighbours? _____

WHAT would make you feel safe in your home? _____

DESCRIBE your idea of a GOOD LIFE in your HOME: _____

WHAT do you feel makes you most excited about this opportunity? _____

Note: Additional questions/information specific to each individual situation should be included

WORKSHEET # 10 (a) – Sample – Identifying Strengths, Gifts and Talents

HOW my Strengths, Gifts and Talents Will Contribute to my Home of Choice

(Personality, talents, interests, social skills, ability to engage others, sensitivity to others, creativity, cooking skills, etc.)

The following is a sample :

☆ Helpful ☆ Friendly & Engaging ☆ Interest in Technology ☆ Likes to be Busy ☆ Sensitive & Caring

AREAS of: STRENGTH/GIFT/TALENT	HOW They can Be used in their own HOME environment	HOW their skills and self- determination are improved/expanded	BENEFITS – Ongoing
☆ Helpful	Help with shopping/cooking/cleaning	Gaining skills in their own home – they have “ownership” interest and control in their own environment	Increased independence and increased self confidence in abilities will lead to ongoing skill development
☆ Friendly & Engaging	Invite neighbours into their home – participate in a “Neighbourhood Block Party/BBQ”	Expanded social network	Exposure and involvement in new relationships increases comfort level of others – leading to additional opportunities/experiences
☆ Interest in Technology	Is able to use technology for enjoyment	Have someone assist them to learn/increase their skills/knowledge	Use of technology can be expanded and potential to be used for other skill areas other than recreational e.g. ongoing learning, safety support
☆ Sensitive/Caring	Others will enjoy being with them and spending time with them/visiting	Take a welcome gift to a new neighbour – make a card or buy a flower for someone who is ill Opportunity to share gifts with others	Possibility of community volunteer opportunities and/or employment opportunities in a Pet Store/Senior Apartment Building etc.

Note: This is just an example of how our strengths/gifts/talents – if shared can open doors to endless opportunities

“People of talent resemble a musical instrument more closely than they do a musician. Without outside help, they produce not a single sound, but given even the slightest touch, and a magnificent tune emanates from them.”

– Franz Grillparzer

WORKSHEET # 10 (b) – How my Strengths, Gifts and Talents will contribute to my Home of Choice

_____’s Strengths, Gifts and Talents
(Name)

☆ _____ ☆ _____ ☆ _____ ☆ _____ ☆ _____

AREAS of: STRENGTH/GIFT/TALENT	HOW They can be used in their own HOME environment	HOW their skills and self- determination are improved/expanded	BENEFITS – Ongoing
☆			
☆			
☆			
☆			
☆			

“To find out what one is fitted to do, and to secure an opportunity to do it, is the key to happiness.”

– John Dewey

WORKSHEET # 11 (a) – Sample – Identifying Needs and What is Required to Ensure Success and Safety

(Areas could include – but are not limited to – Personal Care/Grooming; Mobility/Access/Medical Needs, – Medication, Medical & Specialist Appointments; Dental Care/Appointments; Hair/Nail/Foot Care; Personal Care Needs – Grooming/Haircuts, etc. Cooking; Cleaning; Financial Needs/Payments & Banking; Socializing/Recreational Activities; Communication/Technology; Diet/Nutrition; Grocery Shopping; Acquiring Support Person(s); Training Support for Support Person(s); Role of Support/Circle Network Team Members; Additional Safeguards related information; Other areas as required in each individual situation)

Note ①: Depending on the individual, this section could require several pages

SAMPLE: Note ② : Every situation will be different. It provides a clear outline of the person's needs and at the same time should demonstrate that in all areas the individual should be encouraged to participate at the level they are able. Over time this type of process could provide evidence of individual growth in their ability to remember what needs to be done and/or to actually become increasingly more independent.

Area of Need	WHAT is done/Required	ACTION to be taken	SAFEGUARD(S) in place	Responsibility
MEDICATION Provide/attach lists of meds and medical professionals & dentists Provide daily/weekly/monthly charts including time given and sign off	Requires assistance with all areas of taking Medication – or may be fairly independent (identify level of assistance req'd) Enlist participation of the individual e.g. encouraging them to do any of the steps they are able to participate in.	Support person – Order/Pick up Blister Pack from Pharmacy _____ will Provide Medication to _____ as prescribed/ ensure it is taken as required. _____ participates in process to by: _____	Ensure refills are ordered Ensure a designated person is responsible for assisting _____ with taking medication Ensure record of meds given is kept	Physician – provides updated prescriptions Designated support person(s) _____ (name(s)) provides/administers _____ (individual) takes medication as prescribed/ keep record for safety/accountability (initials/ sign)
Area of Need	What is done/Required	ACTION to be taken	SAFEGUARD(S) in place	Responsibility
SAFEGUARDS	Process in place in the event of a medical emergency Fire Plan	Panic Alarm that goes directly to the Monitoring Company	Teach _____ how to use Panic Alarm and/or to participate when/if needed	Support Person(s) _____ _____ (individual) Support Circle/Network Team Member(s)
Area of Need	What is done/Required	ACTION to be taken	SAFEGUARD(S) in place	Responsibility
Hair Care Shaving (identify needs relating to person)	_____ requires a hair cut _____ per month at _____ (Place/name of person who usually does hair) _____ Washing Hair – # ____ of time per week Identify specifics + # of times per week and/or daily	Ensure hair is kept neat & clean and _____ continues to have it cut as identified Make and/or assist with making appointment Identify When/Who assists with hair washing Identify When/Who assists with shaving if req'd ____	_____ follows thru with appointment Has transportation and money to pay for service Hair/Shaving completed as required (Monitoring and/or assistance)	identify who is responsible e.g.: to make appointments/assist Hair appt. _____ Transportation (to appt.) _____ Money: _____ Checking to make sure Hair washed/Shaving done adequately _____

WORKSHEET # 11 (b) – Identifying Needs and What is Required to Ensure Success and Safety

WHAT _____ NEEDS/REQUIRES TO BE SUCCESSFUL IN HIS/HER HOME
 (Name)

Area of Need	WHAT is done/Required	ACTION to be taken	SAFEGUARD(S) in place	Responsibility
Area of Need	WHAT is done/Required	ACTION to be taken	SAFEGUARD(S) in place	Responsibility
Area of Need	WHAT is done/Required	ACTION to be taken	SAFEGUARD(S) in place	Responsibility
Area of Need	WHAT is done/Required	ACTION to be taken	SAFEGUARD(S) in place	Responsibility

(Additional pages will be required for each area of need as required by the person)

“There will always be challenges, obstacles and less than perfect conditions. So What? Get started now. With each step you take you will grow stronger and stronger, more and more skilled, more and more confident and MORE and MORE SUCCESSFUL.”

– Mark Victor Hansen

WORKSHEET # 12(a) – Sample Budget Breakdown

1. “HOME OPTION COSTS”

Depending on the option chosen, there will likely be monthly expenses to consider. Ontario Disability Support Pension can be utilized for expenses related to food, shelter and clothing. The amount that an individual receives monthly can vary. It is important to factor all “living expenses” to ensure the “shelter” expenses are feasible for the “home option.”

TOTAL MONTHLY INCOME: ODSP: _____ OTHER:? _____

#	CATEGORY	MONTHLY COST	BALANCE
1.	Rent or Mortgage Payment		
2.	Utilities – <i>additional cost or is it included in the rent</i>		
3.	Food		
4.	Clothing		
5.	Personal Items/Spending Money		
6.	Miscellaneous (<i>identify</i>)		

Additional Notes:

WORKSHEET # 12(b) – Sample Budget Breakdown

2. “SUPPORT COSTS” Support costs will vary depending on the level and type of support an individual requires.

EXAMPLES OF VARIABLES to consider that may reduce costs: **SHARED BUDGET EXPENSES** – Sometimes individuals may have a friend with whom they may “choose” to share their living space; A “FLAT RATE” for support may be an option that can be utilized in specific time categories, e.g. overnight; VOLUNTEER hours (consistent) may be available; FAMILY and/or SUPPORT NETWORK support; OTHER SOURCES OF FUNDING can also be a factor to consider vs a home living approach that is completely organized and managed by an agency and/or organization.

It is the intention of an “individualized plan” and an “individualized home living approach” that individuals with developmental disabilities enjoy and can access the same opportunities and standards that individuals without disabilities take for granted, i.e. “Citizenship” rights.

The following provides a “sample” overview/breakdown of hours during a day when an individual may require full or partial support. The determining factor should be the type and level of support a person requires to live as independently as possible in their home environment of choice.

Note: Identifying the hours of support required and then applying possible variables (examples as above) may have a considerable effect on overall support costs.

#	CATEGORY	Monthly Cost	Total Cost of Support
1.	<u>Morning Support</u> – 7 days per week (if required how much time is required for personal care support/breakfast etc.)	Time: from _____ to _____ Total # of hours _____ @ \$ _____ per hour	
2.	<u>Daytime Activities</u> – 5 days per week (how many hours are involved in community/recreation/social opportunities)	Time: from _____ to _____ Total # of hours _____ @ \$ _____ per hour	
3.	<u>Weekend Daytime Support</u> – 2 days per week (Saturday/Sunday) (What type activities require support during the day on the weekend)	Time: from _____ to _____ Total # of hours _____ @ \$ _____ per hour	
4.	<u>Overnight Support</u> – 7 days per week (Will the support required be 24/7, an overnight person who is a tenant in the home/apartment, emergency/on call support etc. Describe: _____)	Type of overnight support _____ Total # of hours _____ @ \$ _____ per hour or other e.g. “Flat Rate”/Facilitator Support Tenant or other: _____ Identify projected cost of “other” \$ _____	
5.	<u>Transportation</u> – identify amount required that is not available from other sources of funding e.g. PASSPORT/ODSP for Medical needs	Projected cost: # of km. _____ @ \$ _____ = Approximate Cost @ “Flat Rate”	
6.	<u>Training of Support Workers, Vacation Costs (Replacement workers)</u> Additional Costs that may apply CPP/EI/WSIB	Varies on type of home option approach that is utilized	
7.	<u>Other?</u> Expenses not identified – specific to individual situation e.g. Administration/Accounting Costs/Case Management etc.	Varies on type of home option approach that is utilized	

The above chart is based on a weekly schedule – it needs to be multiplied by 52 weeks to determine the yearly cost.

Can any of the expenses be “OFFSET” by other funding/ sources e.g. PASSPORT FUNDING/Sharing overnight support/facilitator tenant/support from other person in home etc.?

WORKSHEET # 13 – Accountability/Monitoring and Sustainability

1. Financial Administration

- Family/Support Network Agency Brokerage of Funding Microboard
- Family/Supported by Accountant/Bookkeeper
- Agency Operated Individualized Initiative (*Funding attached to organization*)
- Other (identify) _____

2. Monitoring of Quality of Life, Ongoing Safety/Security

- Individual/Family/Support Network Team Designate(s) from Microboard
- Agency staff/personnel Other (identify) _____

3. Responsibility for identifying and ensuring necessary adjustments/changes are made in home and/or with support when required and/or due to changing needs/requirements

- Individual/Family/Support Network Team Designate(s) from Microboard
- Agency staff/personnel Other (identify) _____

4. Hiring/acquiring Support Staff

- Individual/Family/Support Network Team Designate(s) from Microboard
- Agency staff/personnel Other (identify) _____

5. Responsibility of ongoing sustainability of home choice

- Individual/Family/Support Network Team Designate(s) from Microboard
- Agency staff/personnel Other (identify) _____

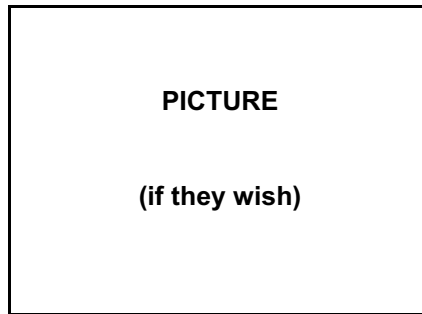
6. Have necessary safeguards be put in place to sustain your son/daughter's future security/quality of life/well-being

- Care Plan/Important Medical/Other Relevant Information Recorded
- Registered Disability Savings Plan (RDSP) Will/Estate Planning
- Insurance (designated to Discretionary Trust) Other (identify) _____
- Successors/Trustees provided with important information

Note: Worksheet # 13 contains some information of a personal nature – it is meant for families to consider safeguards and future security measures that can be taken to assist in ensuring their son/daughter's future well being. In the context of including the information in a Person-Directed Plan details could be made available to individuals who have been appointed as Successor's and Trustees of Wills/Estates/Insurances.

The Person-Directed Plan (PDP) – Putting All the Pieces Together

**PERSON-DIRECTED PLAN
FOR AN
INDIVIDUALIZED HOME OPPORTUNITY FOR
NAME OF INDIVIDUAL**



The following pages of a Person-Directed Plan can contain information from the previous Worksheets as follows:

- WORKSHEET # 8:** CHARTING THE PATH – Vision Statement, Personal Story – Background, History & Current Situation
- WORKSHEET # 9** IMPORTANT QUESTIONS – Your Home – A Place You Love
- WORKSHEET#10(a)** SAMPLE - Identifying Strengths, Gifts and Talents
- WORKSHEET#10(b)** HOW Strengths, Gifts Talents contribute to Home of Choice
- WORKSHEET#11(a)** SAMPLE - Identifying Needs and What is Required to Ensure Success/Safety
- WORKSHEET#11(b)** WHAT _____ Needs/Requires to be Successful/Safe in his/her Home
- WORKSHEET#12(a)** SAMPLE BUDGET – Home Option Costs (Food/Shelter/Clothing)
- WORKSHEET#12(b)** SAMPLE BUDGET – Support Costs
- WORKSHEET#13** Accountability/Monitoring and Sustainability
- WORKSHEET#15** MOVING FORWARD - Action/Satisfaction/Success/Updates

WORKSHEET # 15 – How to Determine and Measure Satisfaction and Success

MOVING FORWARD UPDATE(S)

SUCCESS, ACCOMPLISHMENTS & AREAS OF NEEDED ADJUSTMENT/CHANGE

The following outline is provided to ensure ongoing improvements, needs are identified and necessary changes/ modifications and/or additions to opportunities are accomplished once the Home Opportunity has started and/or is in place.

Date	SUCCESS – things happening that I/We enjoy/like!	SUGGESTIONS I/We have for BUILDING ON SUCCESS	IDEAS for IMPROVEMENT(S)	CHANGES/ ADJUSTMENTS Needed	ACTION Required	ACTION TAKEN	
						By	Date

“No matter how we define success, we can definitely agree upon the fact that a sense of accomplishment can be extraordinarily empowering. Knowing that you’re successful enriches your perception of life..... Success can be extremely motivating. It empowers us to continue the pursuit of our dreams.”

– from Planet of Success



Jot Down Your Thoughts/Questions/Concerns/Goals

For individuals and their families who are thinking about a Person-Directed Home Option Approach, a lot of questions may come to mind, e.g. What about ____? How will ____?, etc. You will also think of things that are routine, important and essential for an individual to continue to have in their life, e.g. routines/rituals, personal possessions, contact with individuals they know/care about etc. Jotting down important information when it comes to mind is important!

INFORMATION & RESOURCES

RESOURCE	TYPE OF INFORMATION	WHERE TO FIND IT
INDIVIDUAL & FAMILY SUPPORT		
Family Alliance Ontario (FAO)	PROVINCIAL Support Network to connect individuals/families. Offers knowledge, tools and networking opportunities to assist individuals and their families to realize their vision for participation/inclusion in their own communities	www.family-alliance.com
Family Voice of Lanark County (an affiliate of FAO)	Individual/Family support in Lanark County providing information sessions and connections for Planning and Action to assist/ensure best possible future outcomes	Contact familyvoiceoflanarkcounty@gmail.com
Sibling Collaborative	Connect individuals who have siblings with IDD, provides Support and Resources	Facebook - Sibling Collaborative Group
INFORMATION ON HOME MODELS		
Creating Housing Choices For People With Developmental Disabilities in Ontario	A Resource Guide / April 2006 Includes information on: Private Market Models Co-op Housing Models, Non-Profit Models Individualized Funding and Personal Support Models. Additional Readings and Resources	Creating Housing Choices – www.accessinformation.ca/document/resource_guide.pdf
Alternative Housing Options for Individuals with Disabilities	A Guide for Forming and Implementing Community Partnerships	center@independentfutures.com
Partners for Planning The P4P Planning Network	Housing Task Force Booklet Webcasts & Resources available on a variety of topics e.g. Registered Disability Savings Plan RDSP, How to Recruit, Hire and Manage Personal Support Workers Learning Centre – SMART Planning strategies, Creative Tools etc.	info@p4p.ca 1-416-232-9444 www.partnersforplanning.ca
“A Home That’s Right For Me” Valuing Choice, Evolving Individualized Residential Options	Summary Report of Policy Forums 2009 – sponsored by MCSS (Jenny Carver & Associates)	www.ont-autism.uoguelph.ca
PERSON-DIRECTED (CENTRED) PLANNING		
Person-Directed (Centred) Planning Resources	A Good Life: For You and Your Relative with a Disability “A Good Life” Al Etmanski	Planned Lifetime Advocacy Network (PLAN – www.plan.ca) http://www.plan.ca
Ministry of Community & Social Services	Guide to person-directed planning (plain language version of the guide also available)	Creating Good Life In Community: A Guide on Person-Directed Planning
MAPS: Making Action Plans	Planning and Action process	Inclusion Press www.inclusion.com
PLANNING TIPS/TOOLS FOR A SECURE FUTURE		
Special Needs Planning Group (SNPG)	Provides information on a variety of related topics: ODSP, Tax Tips, Henson (discretionary) Trust RDSP, Tools/Techniques, “Special Needs Plan” etc.	graemetreeby@sympatico.ca
MICROBOARDS	A small (micro) group of committed family and friends (minimum of 5) who join together to ceate a non-profit organization. “Assist individuals with self-directed living....fulfilling lives”	INFO@VELACANADA.ORG

CONTACTS

People you have met at "HOME LIVING OPTIONS" meetings that you would like to keep in contact with and/or share information etc.

"Share your ideas with people of like-mind and get motivated by their encouragements and experiences."

- Israelmon Ayivon (Shaping the Dream)

NAME	AREA	TELEPHONE/EMAIL	ADDITIONAL DETAILS

PERSON-DIRECTED HOME LIVING OPTIONS HANDBOOK

for

Individuals, Their Families & Support Network Teams

Family Voice of Lanark County and **Lanark County Support Services** (LCSS) hope that our Handbook has provided you with ideas that will assist in planning with your son/daughter to enable them to acquire a home opportunity of their own CHOICE.

Our Handbook is reflective of CITIZENSHIP VALUES.

Encouraging VISION that is based on a “continuum of status - a home owner, tenant/renter resident.”*¹
Changes in the way planning for the future has traditionally been done for individuals with developmental disabilities.

Our ultimate goal is to provide information and ideas to assist/facilitate in creating a “NEW STORY” *²
of INCLUSION in all aspects of COMMUNITY and HOME
a FULFILLING and “EVERYDAY LIFE” *³

“The New Story reflects the research and awareness of a new paradigm of support that include key elements, including individualized funding, independent facilitation, community engagement, strong family networks and person-centred approaches.”

- John Lord

*¹ Al Etmanski – Author of *For You and Your Relative with a Disability: A Good Life*

*² John Lord is co-founder of the *Facilitation Leadership Group* – www.facilitationleadership.com – Author of *Pathways to Inclusion: Building a New Story with People and Communities*

*³ Person-Directed Planning and Facilitation Guide MCSS – www.mcass.gov.on.ca/Person-Directed Planning and Facilitation Guide

Note: In 2018, Ministry of Community and Social Services (MCSS) changed its name to Ministry of Children, Community and Social Services (MCCSS). Throughout the Handbook, references to MCSS pertain to information/documents, etc. prior to 2018.