

“A Home That’s Right For Me”
**Valuing Choice, Evolving Individualized
Residential Options**



Summary Report of Policy Forums
Sponsored by the
Ministry of Community and Social Services

APPENDICES

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APPENDIX A: EXPERIENCES WE CAN LEARN FROM

Possibilities about “Home” and Supports

Individuals, families, agencies, independent planners, and community members have developed and supported many unique, innovative, and highly personal arrangements in creating ‘a home that’s right’ for people. The situations include separate apartments in the family home, owning and sharing a house with room-mates, having a home to themselves as owner, or supporting the person in a market rental or subsidized apartment or cooperative unit.

Some examples of individual arrangements are:

- Man with physical disability, seizure disorder, behaviour issues, and mild developmental delay – lives in 2 bedroom 2 bath condominium – with a media/computer room and DJ studio. The condo was completely gutted and rebuilt around the person’s mobility needs. The staff supporter has a private bedroom and washroom.
- Son lives in family home, but has his own separate suite or “domain” – with a TV, computer, bedroom – that is his to use, but also has access to the entire house, and shares kitchen and meal times with the family. The family hopes to transition him into his own place where he will have more peer and community interaction, based on the natural supports that are developing, but with increased privacy, independence and a broader support system.
- Two men, 32, long time friends who met through sports team for developmentally disabled individuals – moved into 2-storey garden condominium with fenced backyard. Two families purchased the home together. Each individual has private space, own full bathroom and bedroom. 3rd bedroom is used as computer room.
- Individual rents a two-bedroom flat in a non-profit housing complex and lives with a supportive roommate.
- Individual has a separate ‘garden’ suite with private entrance and fully equipped independent facilities in basement of family home. This is seen as a first stage, and the plans are to move to a community apartment situation as she becomes confident with autonomy and develops community connections and a workable support set up.
- Multi-handicapped individual moved from group home into an apartment where most of the residents are families with non-disabled children – and as a result, “the acceptance by these people of my son and his various limitations has been a godsend to him. Even the superintendent and office manager are there to help him with his physical needs when he is facing his obvious limitations.”

- An agency which has moved entirely out of the group home business to helping to create individualized approaches, developed a building design model with two separate units in one building. This allows for autonomy and privacy of an individual and a supportive neighbour or monitor. Many community residents have stepped forward to provide natural support for many years, with valued and mutually supportive relationships developing, as individuals take on roles of neighbour and friend.
- Non-verbal man with a developmental disability (autism and bipolar) lives in his own home and has a live-in caregiver, accessed through Human Resources Development Canada, who is responsible for preparing and cooking meals, cleaning, laundry, bathing, medications, groceries, and making sure he is safe. Additional support staff are paid during day-time hours
- Three people live in an apartment together and receive residential support in a rural area, where before there were no residential supports. They are able to live in their home communities, close to their friends and families, and combine supports to meet their individual needs.
- A person shares a multiple unit home. He needs a lot of support, so the lead agency provides residential support during the weekdays, and a faith community family provides support on weekends so that he can be fully involved in his faith community and practices. A second agency provides day program opportunities, and a third agency provides ongoing counselling and case management. All the services take into account the person's religious observancy preferences.
- Two people lease a home using their ODSP income support. The families partner with an agency, and they all support the two people throughout the week. On two weekends each month, the two people go and stay with their families.
- Two people share a market rent apartment and need overnight support, so the agency provides paid staff overnight support, while the families continue to provide natural supports during other hours. The aim over time is that they will become more independent and able to rely on each other for overnight support.
- Woman, 32, totally dependent on others for all aspects of daily living, legally blind, seizure disorder, developmental delay, and unable to read or write. Moved into own home – a high rise condominium with wide balcony which family purchased. Physically suitable because the family was able to change things before the unit was built. The home is “walking” distance from family home, close to where things happen, near stores and library, coffee shops. The individual has roommates to share the condo – and they are constants over the week.
- Two women (26 and 31) depend on ODSP and received subsidy from the municipality to subsidize the rent for the townhouse that they rent.
- One woman, who has no contact with her family, rents a small house and having had 24/7 support, now has a once per week support person for several hours, and a very significant phone list of unpaid, natural support people who she can

contact if she needs support (with phone support often being enough to address her needs).

- One woman with physical disabilities and a developmental disability lives in a customized condominium unit with two supportive roommates who pay low rent, as well as regular support workers (of her choosing) on a daily basis, and with contributions from CCAC and Personal Attendant Care (PAC). The person and her family are responsible for all aspects of hiring and administration of support.
- One man lives with a roommate in a townhouse unit which was built 'made to order' by a local builder/developer with subsidy from local housing authority. A couple lives in the attached unit and get a reduced rent in exchange for backup support during night-time hours.

Here is a sampling of some individualized support/staffing situations:

- 24/7 staffing (currently a 3-person staffing model in place) with natural breaks for staff when person goes into the community to attend outings and appointments that do not require staff support. Staffing supports are always in place when the person is at home, with the exception being when he returns to the parental home for a weekend or goes away on vacation.
- Person lives in one room of a three bedroom condo, and two supportive roommates live in the other bedrooms. They are back-up for night-time hours, with one week on and one week off. This is in addition to 60 hours of paid support workers during day-time hours each week.
- Agency comes in twice a week to help with cooking and exercise, while individual attends programs outside the home like bowling, cooking classes, etc. Otherwise, natural supports and friends are available in a planned way over the week as evening visitors and night time phone back-up.
- Supportive roommate overnight with family supporting on the weekend – have found this provides consistency, as opposed to different staff coming every night. Individual also has three supporters during the days who are out and about with him and help him maintain his place (grocery shopping, laundry, picking up his own mail). He goes to the family home on weekends.
- Parents sleep over two nights a week and 6 staff share the rest of the time (person requires 24/7 supervision and assistance).
- University student has reduced rent (for extra room in the house) in exchange for night-time support.
- Live in nanny/caregiver set up has been used by two families where it is helpful to have an anchor person around whom natural supports can be built, as well as some additional hours of paid staff time as needed.
- Person lives in their own apartment, where family used to take turns for overnight stay, but where now the person is comfortable with a back up monitor. One paid

support person works 12 hours spread over the week to assist with household management, and the person is involved in out-of-apartment activities on a daily basis during the week. Access to flexible staff on call over the phone, in addition to a paid support worker for 1 or 2 hours per week to assist with finances and planning.

- Partnership with one or more other families to share in providing supports, allowing their son or daughter to live with their friends.
- Supportive neighbour who lives in the other side of individual's duplex provides on call personal support/emergency support. Limited paid support time and regular community volunteer participation during day-time hours.
- Support worker is hired and paid (for 14 hours per week) directly by the person who uses an agency as a broker.
- Cooperative housing projects developed in partnership between individuals, families, housing cooperative organization (and in one case an agency) where contributions are made to fund a facilitator (or in one case the facilitator position is funded through IRM), so that individual plans and supports can be implemented in the cooperative. In one of the cooperatives, the residents are integrated with community members who commit to being part of the 'intentional community'.

Some comments from family members about creating home and support:

- "Because we entered into the arrangement with another family, both my husband and I, and the other family, had to consider what our roles would be. At first it was daunting, then things flowed. The other family is more aware of construction, maintenance; if anything goes wrong, our daughter knows to call them. Our family has taken over more of the administration, the employment stuff, etc. so these roles came about naturally. When we first started, we talked about scheduling. I thought Oh God, I always feel it falls on my shoulders. My husband said – I think I could take that on. So that was taken care of and we moved onto the next challenge." (Parent)
- "About 7 or 8 years ago, my 25 year old autistic son was still living with us. It became apparent that he didn't like the house rules. He needed his space and so did we. With the help of the association he moved out and shared an apartment with another individual from the association. They had limited supervision, but would have someone prepare the evening meal. They had a night attendant, who helped with groceries. Gradually services diminished but the relationship between the two of them was deteriorating. He wanted to be on his own. So he moved into a rent geared to income apartment on his own. It's a fairly large place and he feels secure, at home, is happy, is independent. Autistic children worry a lot. He wanted it to be a secure place and needed a camera in the lobby, and a security key to get into the building. He visits us on his electric bike in the summer. The point is that 7 years ago, we would never had thought that it was

possible. The transition was gradual, but he was ready to be on his own. He washes the dishes every night; he does what he wants and he is happy. Now he has only 1 hour a week of support”. (Parent)

- “Our son is supported in his own apartment in the neighbourhood we used to live in, but don’t anymore, so there are a lot of his old haunts close by, and a community centre that he went to almost every day as a teenager. He pays regular rent, which isn’t quite covered by his ODSP, but he has a rent subsidy. He has a support worker who is provided by the local CL organization which is a unionized workplace. The agency takes care of everything as far as the support person is concerned, and they know what is important to our son in a support person, as we have spent a lot of time planning and working together. If we have to change workers (if someone leaves, moves on, doesn’t work out from his perspective), I just call them up and they identify usually 2 or 3 people for him to choose from with our input. It’s worked really well because the agency knows us well, and we trust them because they have been there for us” (Parent)

Stories about Individualized Residential Approaches

At the Forums, we asked individuals, families, and agencies to provide us with stories about individualized residential situations so that we could share them in this document and give other families and agencies a sense of what is possible. The response to our request for stories was so great that we are unable to include them all here. We hope that those stories we have included will help you to see what innovative options of “home” have evolved so that you can think openly and broadly, rather than just from your own experience of the options that currently exist in your local area.

Story #1:

We have a lot of trust in each other, which is important for both of us ...

Hi I am Bill. Hi, I am Richard – not only am I Bill’s support worker, but also Bill’s roommate. Prior to living with Bill I worked with him for two years. Bill moved out from living with someone (who also needed support) to live on his own in a house, but needed a roommate for the overnight hours. Someone was found but it did not work out, as he liked to stay out late. So the opening came for a roommate for Bill. I asked if I could fill the position and was given the chance. The agreement is I have to be home by 10 pm. We have a contract which is renewed every year. It outlines what is expected from me and from Bill. We share the food and the satellite bill.

From living in the house we made a clean start and moved into an apartment building. Moving into the apartment made it feel it was *our* apartment not just Bill’s; also it is great for Bill to mix with other people both young and old within the building. Also it is not just left to one person to cut the grass and shovel the snow. The location of the building has been important, it is walking distance from the mall and other stores and not too far for Bill’s parents to come and visit. We have been here for four years now.

Our apartment has three bedrooms. Bill has the main bedroom with an ensuite bathroom and a balcony. I have the other two rooms. One is my bedroom and the other is my office. It is important that both Bill and I have our own separate space to get away from each other. With Bill it is his bedroom, where he can watch his sports and TV programs, play on his Play Station, and rest when he wants to. For me it is going to my room to watch TV or my office to work on my computer. The furniture in the apartment is both Bill’s and mine; we both have respect for each other’s furniture – some we have bought 50/50. It has been hard to match each other’s colour schemes but I think we have done a good job. Making the apartment look like a home, we have also done a good job, as we have only a chest of draws that we use for the workers in the dining room and it looks like a part of the furniture.

We have a lot of trust in each other, which is important for both of us, like not going in to each other’s rooms without permission. During the night hours Bill only comes to me if he needs his puffers or if he is having a problem. The workers respect that it is Bill’s and my place.

Story #2:**A good match between the man and the Supportive Neighbour...**

A 40 year old man with autism needs 24-hour support in general but is able to spend some time (half an hour) alone. He lives in an apartment in a “regular house” which is just another house in the neighbourhood. He has his own entrance, but has a “Supportive Neighbour” upstairs – and they can get to each other’s homes inside the house. His mother is highly involved and there is some involvement from other family members and his circle of friends. There is also support from the agency. There is a “Supportive Neighbour” agreement between the neighbour and the family. The Mother’s philosophy is that the arrangement needs to work for the neighbours in order for it to last. So far it has been three years and it is still going strong. What makes this work is that there is a good match between the man and the Supportive Neighbour and the staff team are also well matched. There is also a good “compensation package” for the neighbour that works.

Story #3:**When she chooses, she says “Mom and dad I’m inviting you to visit me”...**

Our 35 year old daughter has a chromosomal abnormality causing poor muscle tone, connective tissue disorder, chronic pain, fatigue, and severe gum disease. This condition has also caused a moderate developmental disability with severe speech and language delays. She tends to have behavioural outbursts when she is worried, uncertain, sick, having pain or tired. She cannot read or write, does not know money or time. She needs help with activities of daily living, assistance with bathing, teeth cleaning, preparing meals, laundry and cleaning. She needs support and direction with schedules, time, and travel.

She is very determined and wanted to be independent, with her own place for her and her puppy. She loves to do what other people do, is very actively involved in community, with a large extended family and church friends. She participates in art, dance, Special Olympic swimming, and track and field. Over the past few years she was unsuccessful in a group living situation with inconsistent support and large staff turnover; her behaviour and medical condition deteriorated.

We hired an Independent Planner, retained the services of a private psychologist, and with the inclusion of her personal support network, developed a Life Plan for our daughter. With consent from MCSS to have her funds transferred to another TPA – with an agreement from this agency to partner with us to put in place “A Home That was Right for Her”. Six months ago, it was decided by our daughter and her team that the best place for now for her life, was to live in her own apartment, a secondary suite (1000 square feet) in our family home, receiving support from workers of her choice and accepted as compatible by the team. She contracts with the support workers, with one

acting as the Team Leader, who schedules and ensures invoices are prepared for submission to the TPA Partner.

This situation is the best fit for our daughter's life and is the optimal situation at this time. We gauge the fit for her by her behaviour. Her happy relaxed state and the fact that she has not had a behavioural outburst since moving to her own apartment is the proof. Living in her own place, with her puppy and her own workers has provided her with consistency and security. She constantly tells people, in her broken speech "My Ruffy and I have our own apartment now". Our daughter and her puppy's home is very warm and inviting. She is surrounded by everything she loves and chooses, such as her own art, gifts from family and friends, her favourite stuffed animals, pictures, Special Olympic medals, tons of photos, and most of all, tons of music. She plays music upon awaking, while waiting for her bus, as soon as she returns to her apartment, and before she goes to sleep. She has special things such as a lamp from Gramma, her favourite photos of her brother, niece and nephew, her gramma, mom, dad and lots of aunts, uncles, cousins. She is most relaxed when she can live this lifestyle. She is supported in preparing her favourite food, entertaining her friends with meals, movies and music. When she chooses, she says: "Mom and dad I'm inviting you to visit me."

The AM support worker arrives at our daughter's apartment at 7AM, Mon-Fri, wakes her up, assists her in preparing for the day, stays until 10 AM to complete reports, tidy up and prepare a meal for the evening. Our daughter is picked up by a transportation company at 8:30 AM, Mon to Fri and is delivered to her Recreational-Therapeutic Program. She is delivered back to her home by 3-3:30 PM. The PM support workers assist her from 3:30-4 PM to 8/8:30 PM, Mon-Fri. They accompany her to art, dance, Special Olympic events, or some evenings spends quiet time with baths, preparing clothes for the next day, or entertaining friends. A weekend support worker spends 4 hours on Saturday helping her with her apartment cleaning, laundry, shopping, etc. For 4 hours on Sunday, the support worker takes her to church, maybe out for lunch, and during the winter takes her to Special Olympic swimming. Additional support is provided as In-Home Respite when the family is away overnight.

The TPA partner agrees to adjust this partnership as needed by our daughter in the future. Options could be that she will own the home and could "Home Share" and hopefully receive continuum of care in the home. If, as she ages and requires different supports in another setting, the TPA in partnership with our family, circle of support, or her trustees, will work together to implement the best plan for the best life for our daughter.

Story #4:

Lucky to be in close contact with so many like-minded people...

Our son is 33 years old. He needs someone with him 24/7 – during the night because of seizures, and during the day for safety reasons and to get to places in his community. He also couldn't call for help in case of an emergency. Our vision for him after high school was that he would move to a place of his own, just as his younger siblings would when the time came. His goals were to work, volunteer, enjoy recreational activities, have his own social life, and generally lead a balanced lifestyle with family, friends, and supporters.

He has lived in a few places after leaving the family home. He now rents a two bedroom flat in a non-profit housing complex. He has always lived with a supportive roommate (different ones over the years). His home is well kept and comfortable. He feels quite at ease there and is obviously in charge. It's conducive to relaxed discussions and visits with family, friends, and supporters.

His supportive roommate provides consistency, as opposed to different staff coming every night. We have found that this arrangement leads to a more "homey" atmosphere. In addition, he has 3 supporters during the days who are out and about with him and help him maintain his place (grocery shopping, laundry, picking up his own mail). He comes to the family home on weekends.

His physical environment is comfortable – he has his own beautiful, original art work decorating the walls and coffee table. He is the host for get-togethers and meetings. He proudly displays framed certificates of achievements. His home centres around him. His active times are during the day so that's when his supporters arrive to go out with him. By the evening he wants to relax so he does big helping with dinner and enjoying a leisurely meal.

The partners are his parents, brothers, and sister who are involved in his life and hold his dream. His siblings are directly involved when his roommate is away, or when supporters cancel or are away. The agency is key in supporting all of us to hold on to the dream, and are always working on improving and expanding our son's life experiences. The agency brokers the funding, helps to recruit, train, and interview supporters.

Within our family support network, we have regular meetings with our facilitator and have gotten to know each other and each other's adult children very well over the past 13 years. Even though each family is in a different situation, we understand each other and share information. The facilitator always makes herself available to us. The agency provides many workshops and lets us know about other ones that are provided by other family groups or agencies. They have an excellent lending library of materials. The most important aspect of the partnership is the commitment to one another that comes from knowing people in agencies and families over a long period of time. It is inspiring to see the success around you and to share your success. Also, our son has

never been in traditional services or a residential setting, so the only way forward for us is to make this work. I'm very lucky to be in close contact with so many like-minded people.

**Story #5:
Respecting and fulfilling a young man's dreams and visions...**

For many years, a 31 year old non-verbal intellectual man with dual diagnosis of autism and bipolar has communicated (by means of facilitated communication) his needs, visions, and goals to live in his own home. He is sensitive and has clearly identified his wishes to live in his own home as well as to do the kind of volunteer work he likes to do. He could not live and survive in a group home due to his special needs and requirements as well as the daily constant changes of staff. He requires a one-to-one person to meet his needs so that he will be happy and they can learn his communication system and his routines. He does not like changes. Even though he requires someone to assist him in life skills, it has not limited him from enhancing his ambition to develop some independence in performing them.

His dream to live in his own home finally came true about 4 years ago. Since then he has been very happy – his aggressive behaviour has almost diminished, his life skills and independence have improved, and he is making his own choices about doing things. He lives in a 3 bedroom, 2 storey home (which is about 9 years old) in a residential neighbourhood of single family, detached homes. He has his own bedroom with a bathroom en-suite for himself. The kitchen, eating area, dining, and living room are open concept so that he can see and be part of all his daily living activities. He chooses what pictures he wants on his walls and trinkets he likes to have around his room. He likes to entertain in his own home and enjoys that. He requires his own space and privacy. He likes to listen to music, usually at a high volume, watch certain programs on TV, participate in household chores on a one-to-one with his caregiver so that he is learning to develop more life skills, and he has his own trampoline and swing chair in his backyard to use on his own. Recently, he indicated he wanted to ride a bicycle and he is learning to ride it. His home gives him a sense of belonging, identity, control, and safety and a person-centered flexible approach. The uniqueness of this physical environment for him is that most of the doors and cupboards are locked. There is also a functioning alarm system for the outside doors which is needed for him and keeps him safe as well as an alarm system to wake the caregiver at night for his safety. He has free run in his backyard which has a locked fence so he can be outside independently and safe.

He has a live-in caregiver who is responsible for preparing and cooking his meals, cleaning his home, doing laundry, bathing him, giving him his medications, monitoring his medical issues, shopping for groceries, and making sure he is safe. He can choose his own groceries and decide on meals. He is supported by his parents, caregiver, mediators for his volunteer work in the community, wrap-around group, and agencies. Parents are responsible for the hiring of live-in caregiver and mediators. He is involved

in the interviews and makes the final decision as to who he wants to support and work with him. Recently, he made the choice to dismiss a mediator and is much happier with the new one hired two months later. The agencies provide support around some funding, job applicants, and some supervision of mediators and caregiver. The wrap-around group assists him in fulfilling his dreams (e.g., having his own home, volunteer work placements, or any other desires he wants). The mother of this man arranges and monitors the hours of the workers, is responsible for paying them as well as completing all the paperwork and documentation required for accountability, takes him to all doctors and dental appointments, takes him and his caregiver to do all the grocery and clothing shopping, and relieves the caregiver from her duties for one night a week, one weekend a month, two weeks a year for her vacation time, as well as any time he gets sick or a mediator or caregiver is sick and/or leaves (during all these times, he goes back home to live). The father looks after fixing things around the home and takes him to sports games.

The parents are very concerned about the succession plan for his model. Who will take over their roles when they are no longer here? A plan needs to be put in place to fulfill this gap and need. Who will take him to all medical appointments? Who will provide transportation? Who will do the hiring and paying of workers? Who will do all the maintenance of the home?

Story #6:

Living with normal families has given our son the encouragement to be part of the community and its activities...

I have a multi-handicapped son who, until five years ago, was a resident in a group home where he was the highest functioning individual there. This residential placement had nothing but a negative effect on him for years to come, as a result of the anger he felt at the unfairness of his placement. He pleaded to be taken out. I thank God that I lived to enjoy the experience of taking my son home just 9 years ago to a more promising situation thanks to the intervention of an agency I am proud to be a member of these many years.

For the past 5 years my son has been living in his own apartment and working in the community. He is enjoying a sense of responsibility and self esteem denied to him for so many unfortunate years of misplacement. These years of freedom and fulfillment in being part of the community and being responsible has given him a sense of self-esteem that he lost over those years. He is happy and hoping for more fulfillment in the future – possibly marrying and caring for another individual who will share his goals of “moving on” past their limitations as individuals who have needs beyond what has been given to them in life.

He is now in an apartment where most of the residents are families with normal children, and as a result, the acceptance by these people of my son and his various limitations, has been a godsend to him. Even the superintendent and office manager

are there to help him with his physical needs when he is facing his obvious limitations. People are eager to join him when he goes swimming in the tenants' pool because they know of his epilepsy and watch over him should he have a seizure in the pool area. Living with normal families has given our son the encouragement to be part of the community and its activities, where the isolation of his previous residential placement hampered him from making friends and sharing in activities within that community! One thing about my disabled son is his ability to win friendships wherever he has an opportunity to do so. He is an affectionate as a puppy and reaches out to anyone who will share time with him in their busy days.

My son has been singularly blessed with an enormous circle of support that took time and energy to create and maintain, involving many agencies working together with a common goal to provide the support he so badly needed throughout his last ten years of freedom from confinement in a situation that should never have happened! His involvement with the developmental services system as a self advocate speaks volumes of his gratitude to those agencies who helped him achieve his life goals and dreams and who even now are there to support and maintain him "in the lifestyle he deserves"! His brother has been the most devoted and dedicated member of our whole family – and it is in his relationship with my son that has sustained him throughout the many crises that the years have brought us. His support worker of 5 years duration is probably the sister he always wanted to have – her commitment to his happiness and fulfillment is beyond words to describe. I know that she doesn't consider my son as a client – but rather as family and treats him accordingly whenever she spends time with him – while holding two other full time jobs at the same time. Her devotion is beyond understanding for me!

Story #7:

A university student provides night support in return for free rent...

A 26 year old woman with Down's Syndrome and OCD expressed a desire to live in her own apartment – something she had always talked about. She now lives in a two bedroom apartment which is close to a bus stop, near a grocery store, drugstore, Tim Horton's, Blockbuster, and Pizza Pizza. The apartment building has people from all walks of life.

Community Living has been very supportive to this individual. Her mother, sister, and brother-in-law are also very involved and supportive. Another thing that makes this arrangement work well is that the apartment is shared with a university student who provides night support in return for free rent.

Story #8:**All the families and individuals know we can count on each other...**

A 47 year old woman with epilepsy and a developmental handicap lived at home and wanted a place of her own. The unusual aspect of the development delay (equivalent to acquired brain injury) means that only part of the reasoning process is impaired. She would be very unhappy in a closely supervised situation with little choice of action. She is focused on independent decision making and being recognized as a valued member of community, as well as on her artistic interests, particularly making jewellery and gardening.

She has a two bedroom apartment on the ground floor of a coop building, where she has lived for 15 years now and is well known. Her apartment has a patio and a small garden. Safety features have been installed related to her physical disability (epilepsy). All furnishings and decorations were the choice of the supported person. There are many photographs of family and friends. Groups of interested parents sought funding for, hired the architect, and supervised the building of the coop.

There are paid support workers plus support circle members and family. One of her paid support workers lives about 40 yards along the hallway. Regular meetings of her support circles are held to provide a forum for her concerns. Key support, besides family and support circle members, is the agency that administers the funding that pays for the personal support workers.

There is a partnership agreement, membership of the supported member in the organization, assistance with hiring and training staff, and a community facilitator. She has a wide circle of acquaintances which has been fostered by supporting her ventures into the community. These people are often useful in times of crises or even, for example, when she has computer problems or in helping to market her jewellery. I do believe that because our organization is small and we all know each other, there is deep commitment by everyone involved and all the families and individuals know we can count on each other.

Story #9:**There is a great deal of cooperation, no ownership of a “program”, and a willingness to cross boundaries...**

Two ladies, aged 26 and 31 both wanted all of the things in their lives that every other young person wants: their own place to call home where their friends could hang out, boyfriends, jobs, etc. Both ladies have significant physical challenges. One uses a wheelchair for mobility. Both ladies require extensive personal care. Neither of these young women wanted to live alone. Both depend on ODSP.

The ladies now share a beautiful townhouse (one of four units) in a nice neighbourhood in a small town. They have their own rooms and bathrooms affording them the privacy they both need. The townhouse was custom built to accommodate their needs with the bathrooms requiring several changes. The townhouse was built in partnership with a local contractor and the women entered into a contract with the a local agency to subsidize the market value of the townhouse (1,500.00 month). They pay \$126.00 each with utilities included.

Support people were hired and paid by the agency – the ladies participated in the hiring process and have input in performance appraisals. Family members come and go and participate in the support needs for the ladies. The agency provides approximately seventy-four hours of support per week and have set up access to 24-hour assistance as required. External monitoring is in place in the event of fire, intruders, etc. Community Care Access Centre provides 8-10 hours of personal care (catheters, etc.). Another agency outside of the area is involved as they support one woman’s boyfriend – this is significant as he spends three days per week with her and support hours are shared.

The families actively participate in decision making with the women. Possibly the most challenging element for support staff is presented when the wishes of the ladies conflict with the opinions of their family members. We are able to identify barriers one at a time and work through issues. There has to be a willingness to cross boundaries. For example, when CCAC is not able to provide physical care, the agency fills in. Funders are also willing to cross logistical boundaries.

The current arrangement suits the ladies perfectly and they continue to be very happy. The agencies admit that there are many challenging issues with so many people involved, but at the end of the day, there is a great deal of cooperation, and no ownership of a “program”.

Story #10:

He receives guidance while having relative freedom to come and go as he pleases...

Our son has a developmental disability, is 28 years of age, 6' tall, about 170 lbs and is in good health. He lives in a small Ontario community and has taken steps to get to know others in the community by doing volunteer work and joining sports teams. He is capable of holding down a full-time job as long as supervision is provided throughout the workday.

While our son would like to live completely independently, the trials we completed with him show that is just not practical. The solution, which was found with the help of an agency, led us to apply for Ministry funding through "The Innovative Residential Funding Model". It was that funding that enabled us to arrange a placement for our son within a family home where he lives and receives most of the supports required. The agency provides additional supports.

The home belongs to a well-qualified lady who worked as a teacher's assistant while our son was in high school and worked with him at that time, as he was integrated into regular classes. Our son has separate rooms, which include a bedroom, washroom and sitting room, and has his meals with the family. In addition, the home provider facilitates transportation, as required, for medical, dental, and other appointments. It is a clean, well-kept home in the centre of town whereby our son can walk to all parts of town. What works is having someone who knows our son and in whom he has confidence. He is comfortable in the placement and comes as close to living independently as he can while being safe and provided with the necessities of living. He receives guidance while having relative freedom to come and go as he pleases.

Our son receives support in terms of housing, meals, finance, transportation, safety, training, and lifestyle guidance in a caring home environment. Our agency provides assistance in seeking employment opportunities for our son, testing independent living options, identifying funding options available to help our son, and assisting him to develop an annual plan of goals and actions to achieve those goals. Our son needs supervision but also someone who will increase his levels of freedom as he expresses the desire to be more independent. The home provider does this with his safety in mind, whereas, as his parents, based on our experience with him over the years, we have developed opinions that limit our willingness to give such independence. The partners in this arrangement that make it work include: our son, his parents, the home provider, the agency, MCSS, an adult protection worker, and a therapist. There are two contracts – one between the parents and the agency and another between the parents and the home provider. There is frequent communication between the home provider, parents and the agency so that problems that arise can be dealt with quickly and effectively.

Story #11:

Everything is a work in progress because life is not static nor should it be...

A young lady, who is 32 yrs old, is totally dependent on others for all aspects of daily living. She uses a wheelchair, but is not able to propel on own; she has a developmental delay – is unable to read or write, has reasonable speech, is “legally” blind, and has a seizure disorder. She likes to be well dressed. She is friendly, social, enjoys having tea, enjoys movies, books, listening to radio, watching TV, and loves anything to do with food (watching cooking shows, cooking, planning meals, hosting dinners). She is a swimmer and a volunteer. She is a connector of people who wouldn’t normally meet. She inspires people, and motivates people.

For this young lady, her siblings, and for the parents, the vision for “home” is based on “what do typical individuals, typically do, at any typical age in a typical situation”... An individual has the right to a life independent from parents – siblings should be siblings and parents have the right to be empty nesters at a reasonable age. Her goals started as the parent’s goals...and it took a few years for their daughter to buy into the plan. The goal was to have their daughter’s life follow a similar path as her siblings...to get established in own home before parents were no longer able or were in crisis. The vision was for their daughter to get help with decision making from others, not just parents and siblings; to contribute to the life of the community she lives in, be known in the community; to be happier and therefore easier to live with and more easily supported.

The vision started with identifying the “support needs” and “dream” and then went about finding the home. The family considered how “normal” people approach moves...then considered the compromises they would need...and had a check list. They wanted a home in local community where their daughter grew up and where the family has connections. You are “safer”, more connected where you are well known. They wanted to build on the good will they had fostered over the years.

Their daughter moved into her own home when she was 30+. She lives in a wheelchair accessible high rise condo with a wide balcony (no exterior maintenance) in the downtown area of a city near where she is able to walk to places instead of always having to drive, and is therefore more visible. She is close to where things happen and are easy to get to: downtown, near stores and library, coffee shops; able to “walk” to things so more visible in the community; the neighbourhood is familiar to her so that her “haunts” stayed the same. She is also close to her family...walking distance from the family home so she is more inclined to mutual visits, drop-ins etc. The family has a wheel chair van which is shared with her. The condo is family owned. Because it was a new condo, everyone moved in at the same time...in this respect, they were more inclined to be welcoming and open to new friendships. There is a mix of ages in building. The home is physically suitable because the family was able to change things before the unit was built. Having the “home” wheelchair accessible meets their daughter’s physical needs as straight forwardly and as safely as possible for all concerned. It also encourages her participation in her home ownership as much as

possible. The home is nicely furnished and decorated to reflect the value the family places on their daughter and is filled with furniture that has a history or meaning to her.

The agency supplied staff for early mornings to get up and ready for the day. It took many years to get consistency. Now the Transfer Payment Agency writes the cheque, but has no other involvement or supports. The family hired support staff for their ability to support the vision, facilitate community inclusion, and for “fit” with their daughter. She also has roommates to ensure overnight safety and security in case of emergency. Family and friends are close by for back up and involvement. The roommates who share the condo are the constants over the week. Supporters come and go daily. Roommates have no support needs or responsibilities, but the family hopes that a friendship will develop.

The family and their daughter have a close relationship with independent facilitator. This facilitator works for an organization but the family had input into her hiring, therefore there has been some trust from the beginning. Her degree of involvement depends on what is happening in their daughter’s life or the family’s life. She also has a relationship with their daughter apart from her relationship with the family. The individual sees the facilitator as being there for “her” and she helps move things forward when the parents “stuck”.

People in support circle take on various roles or short-term responsibilities (e.g., assisting with interviewing); even those who do not live locally can support the vision (e.g., two “out of towners” research, write, and distribute the individual’s “memo” to keep a wider circle of family and friends aware of what is going on and help them feel connected). A number of things make this arrangement work well. The support of an independent facilitator has been invaluable. Having a “plan”, as well as involvement in a family group and a support circle, make this situation possible and sustainable. The family noted that “Everything is a work in progress because life is not static nor should it be.”

Story #12:

Commitment has resulted in a strengthened communication system...

Two men aged 32 years old are long time friends who met through a hockey team for developmentally disabled individuals. Both wished to move away from their parent’s home. The two men were involved in the search for a suitable home which is a two storey garden condo with a fenced backyard. There is nothing in its appearance to indicate that its residents are developmentally disabled. They chose this over an apt. type condo and the location was chosen based on proximity to public transit and shopping opportunities. The two families came together to purchase the home and are currently working on a legal partnership agreement, regarding ownership of the home.

Efforts were made to ensure each individual had private space. The home was renovated to provide each man with their own full bathroom. Each has their own

bedroom. A 3rd bedroom is used as a computer room. The basement is finished with a powder room. A washer & dryer are also in the basement. The main floor contains a kitchen, dining room and living room. Each man has claimed one of the living spaces as their preferred place to watch TV.

Supports are provided by a local agency and the support workers ensure there is a support network based on the men's preferences and interests – one has volunteers to help out with an exercise regime and improving reading skills. This home has two main workers that are the primary supports for the men. They arrange their schedule around the needs and are able to adjust the support as required. The two staff people assigned are part of a larger team that help to assist people living independently. This larger team is able to ensure a consistent support throughout the year. The men also have access to a 24 hour per day, seven days a week on call system that gives them direct access to an agency Manager in case of emergencies. Other supports are added as needed and depending on the situation. For example a psychologist who was contracted to assist when the relationship started to show signs of breaking down. The families, with the support of the two men, placed a surveillance camera in the ceiling of the kitchen. The families initially expected to be the main support for the 2 men due to the limitations of funding – and wanted a way to watch meal preparation, to ensure safety, if the men were on their own. Both families can view the kitchen via an internet site. Given the supports available through the individualized residential funding, the camera is seldom used. Workers are aware that there is a possibility of being seen during their interactions with the men. Their lack of concern about the camera has been reassuring to the families.

One family member is in the process of developing a manual for other families about a shared accommodation experience involving two families. There is also a strong commitment from all partners, the men being supported, family members and agency staff to make this work. That commitment has resulted in a strengthened communication system that works to make this arrangement work well.

Story #13:

This is his home, not his parent's idea of what his home should look like...

Our son is 34 years old and, since graduation from school, has insisted on having his future as he sees in his older brother – he wanted his own apartment – not living with his parents; he wanted a “real job” where he got paid; he wanted to be near his friends. He wanted his own life, just as he saw what his older brother had.

The home is a small bungalow built in the 50's – completely renovated by his father – into a one bedroom home for our son. There is a kitchen, living room, family room, large accessible bathroom made from previous very small bedroom, large bedroom, and mid-size front and back yard. It is very “home-like”, decorated by our son with his sister's help. Our son has lots of space to be alone whenever he needs that – everything is on one level, therefore planned for accessibility as will be needed for the

future. Home fits with son's preferences and needs totally – this is his home not his parent's idea of what his home should look like. He proudly says that his “home is nicer than my sister's”.

In the past when he first left the family home and moved to an apartment, he had 24 hour support. Over the years at his insistence, that support has decreased from day/evening support and no overnights to current support of 20-30 hours per week, with combination of funding alternatives. He has hired companions, and also has lots of support from family, friends (school, church, workplace), and neighbours. The support from friends and neighbours has primarily come about through our son himself, making sure he is involved in the neighborhood, his church, etc. There is trust in each other – our son, family, agency, and friends. In place are agreements for “companions” with needs specific to him – information is available from the agency about how to interview and hire, confidentiality agreements, “role of companion” information, service agreement forms etc.

Story #14:

They use a hard-wired monitor to a supportive neighbor to call for assistance if needed...

Two brothers who are 27 years old wanted to have their own place and to enjoy being bachelors – but they also wanted someone close by. They moved together into a three bedroom home and each brother has their own room. The third bedroom is used as a second living room. Each man has their own TV and DVD players, so they can watch a movie together or entertain separately.

Staff provide two hours of support each morning. There is also a supportive neighbor upstairs who assists with supper meals five days a week. Staff help with the other two supper meals. A hard-wired monitor is available for communication between the men and the neighbour. They use the monitor to call for assistance if needed. Both men want to live on their own – but feel more comfortable knowing someone is available overnight.

These brothers are supported by a number of people – brothers, sister, mom, co-workers, friends, a supportive neighbor and other neighbours and their friends. There is a written agreement with the supportive neighbour which is reviewed annually.

Story #15:

Now he's living the vision we had for him so many years ago. We didn't settle for anything less....

It doesn't seem like a big dream – to be living in a downtown apartment building with a roommate. But it is, because it means you are living a regular life. When our son was born, we were told not to expect too much. Very little was known about autism 40 years ago. Nothing was available and there was very little research. Even today our son is not understood by lots of people who can't imagine that there's more to him than meets the eye. But our vision for him was the same as for our other sons – having friends, living in a place he liked, being happy. We didn't know how much work it would be to actually make that happen!

I guess it's easy for the years to slip by. My husband and I always thought our son would leave the family home eventually. But every birthday came and went and we just weren't comfortable with handing him over to a group home – the only option there was. It worried us because so few people who need help 24 hours a day can express their wants, needs, pain, or preferences. We would have gladly kept him at home, but we knew it wouldn't be fair for him or his brothers to have to make a major adjustment when we die.

Then about 15 years ago a friend started talking to us about a circle of friends. My son, my husband, and I met with this friend and started a list of people who might be interested in developing a friendship with my son. It included everyone from old teachers and neighbours to former staff who used to work with him during the day. The circle started out as a way for our son to have more contact with different people and situations. His friends have made a difference to his life. I think other people see him more as a person with real needs and interests, because he's seen with friends at different places around town.

But our son was getting older and still living at home. My husband and I decided to turn to our son's friends for help in planning for his future. The circle began to meet monthly and talk about our son's dreams and future living arrangements. There were usually 13 or 14 family and friends at our meetings. We wanted something for our son that would meet *his* needs, not where he would have to fit into an agency because they have a 'bed' available. He is a person with dreams and hopes and interests and needs. He deserves better than being slotted with people he didn't choose to live with, and in a group home he could get moved around at the whim of the agency. We wanted to be able to decide who would be hired to support him with the daily things he needs help with.

But it's not so easy when you have a disability to just move out of your parent's home. You rely on the government to help fund the supports needed to lead an active life. And the system includes a lot of group homes. So if you don't want that, there's not a lot of options. We wanted our son to have a choice about who he lived with and how he lived and who he hired to support him with the daily things he needs help with. But we were

told over and over again there is no money (and no spaces in group homes even if we wanted that for him). In 1993 we wrote out our vision: that our son be living in his own apartment of a downtown apartment building with a roommate who could provide some support.

Eventually we secured enough funding for our son to live in his own apartment a couple nights a week. I think it was a good transition – more for my husband and I than for our son! We did that until he could move into his own place with a supportive roommate. He then lived in a downtown apartment building with a supportive roommate for a few years. He has had a couple roommates over the years and all brought something unique and special to relationship. Eventually our son moved into a condominium downtown, that we own. He continues to live with a supportive roommate who has their own life and full-time job, but shares time with our son and provides overnight support. It's comfortable now that my son and I have a choice about the workers and what life looks like – I used to interview all the workers and watch them interact with him before choosing; now I trust the agency to do all that. Our son and I meet the worker they've suggested before a final commitment to starting work is made. Our son is also pretty clear if he doesn't want a worker. I must say that the workers are amazing and always go above and beyond.

When I think about where we were 15 years ago, I am so happy for our son that he's living the life we believe he wants. Now he's living the vision we had for him so many years ago. We didn't settle for anything less. He lives downtown with a supportive roommate and has control and choice over how his life looks, with help, of course, from his family and circle of friends.

Story #16:

I'm happy to have my cat because he makes me feel not lonely anymore...

I work with an agency and would like to help "Dave" share his story about finding a new home. Dave is in his 50's and is a personable guy who would love to have a paid job. He loves sport and friends. He wishes to have as much independence as possible, but needs personal and medical support. He needs 24 hour supports and needs his home to be fully accessible.

A couple of years ago Dave's Dad moved to a nursing home. His Mom needed to move to a smaller apartment with no stairs. Dave liked life the way it was, but knew it was time for him to move on. Dave and his family lived in city housing and Dave asked if his home could be renovated to meet his needs. He liked his home and neighbourhood but there were some problems. Dave could not use his bathroom and needed to shower and bathe elsewhere. We met with city housing and they looked into the possibility of renovating the home for Dave. It was a two-story "wartime" house and because of the layout, there was no way it could be renovated for accessibility. In the early spring of 2003 we began to plan for Dave to move to his own home. The City housing department understood Dave's need and recognized that accessible housing was a

huge problem for people living in our city. They were willing to work with Dave and his agency to see if we could find or build an accessible home that the city would be able to subsidize. We discussed the financial guidelines that had to be considered in order to apply for subsidized housing. Dave qualified.

We were not successful in finding anything that could be renovated to suit Dave's needs and started to look for a builder to build an accessible home that could be subsidized. We also hired an Occupational Therapist to help with designing the home. She had recently assisted someone else in our area move into an accessible home. She had discovered a builder in the United States who was building "O" Level entry homes and convinced a local builder to use the design. We thought it would be wonderful for Dave to be able to enter his home without the use of a ramp or lift. I talked to Dave and showed him the plans. He said "It looks good to me", so we began to move forward. I spoke to an investor our agency had worked with in the past and asked if he would be interested in building a duplex – one side to be accessible for Dave and a roommate and the other side for someone who would provide some assistance if needed primarily during night-time hours. The investor I spoke to was very interested and referred us to another investor who was "a good guy" and said that he would act as a backer for his friend. It sounded great.

In June of 2003 Dave received word that he had the support funding necessary to move forward. There was nothing stopping him now. The next step was to find property and a builder. I contacted a real estate agent. I knew that agents have an inside track on property. In early July a property, suitable and zoned for a duplex, came on the market and was purchased by the real estate agent. The agent had connections with a builder and set up a meeting with the investor, the builder, Dave and myself. The meeting was in July; the property was to be available in October and construction to be completed in January. Dave got a copy of plans and took them home to share with his Mom. Everyone was very excited and ready to move ahead. His new home has lifts in the bedroom, bathroom, and living room. The living room, kitchen, and dining area are one open space. There is a sizeable back yard with deck, ramps, and sun shades.

All Dave had to do now was find a roommate, hire staff, and find someone to live in the other side of the semi. Dave had lots of fun with this. He had many suggestions for roommates. He had a great time meeting families to live in the other side of the semi. Dave chose a couple and the agency met with them to work out an agreement for a rent subsidy to compensate for their commitment to be available to provide assistance if necessary during night-time hours. The next step was to hire staff. Dave and someone from our agency interviewed a few candidates. Dave eventually found a roommate, bought a cat, and hosted a giant open house.

For morning and evenings, a support worker assists with food preparation, personal hygiene, medication, clothing, and housekeeping. During the daytime, he has a volunteer job part time in the community and is involved in social/recreational activities in the community. For overnight, the Supportive Neighbour living on the other side of the duplex provides on-call personal support and emergency support. The side-by-side

duplex provides opportunity for the supportive neighbours to be immediately available, yet live independently. Dave has two house-mates – one on his floor, and one in a private apartment in the basement. They share costs, resources, and are socially compatible with similar interests. He also has a volunteer who provides social support. His housemates are consulted before hiring staff, etc. and they have weekly house meetings to discuss house issues. Dave is close to his family, and while his mother can no longer look after him, they have a close relationship. He attends the same church as his family. Dave enjoys hosting get-togethers with his family and friends. He is happy to get out and do things on his own like going to the bank, using his own money, and buying his own groceries. His backyard provides him with a lot of pleasure. He also says that he's happy to have his cat because he makes him feel "not lonely anymore".

APPENDIX B: RESOURCES

The following resources were recommended by those involved in forum planning discussions and from families and agencies who participated at the Forums. This resource listing is not exhaustive, but will provide a number of books, websites, and key contacts that have been identified by participants as having been helpful during the process of researching, planning, and implementing individualized residential approaches for individuals with a developmental disability.

BOOKS, PAMPHLETS, ARTICLES, and DVDs

Reference & Contact Information	
<p><i>A Good Life for you and your relative with a disability</i> by Al Etmanski</p>	<p>Planned Lifetime Advocacy Network Suite 260 – 3665 Kingsway Vancouver, B.C. V5R 5W2 (604) 439-9566 http://www.agoodlife.org/</p>
<p><i>A Little Book About Person Centered Planning: Ways to think about person-centered planning, its limitations, the conditions for its success</i> Edited by John O'Brien & Connie Lyle O'Brien</p>	<p>Inclusion Press 47 Indian Trail Toronto, ON M6R 1Z8 Canada 416-658-5363 www.inclusion.com</p>
<p><i>A Place Called Home: A story about a life unfolding</i> by Alison C. Ouellette</p>	<p>A.C. Ouellette c/o WEBPS, 3357 Walker Rd., Unit 2 Windsor, ON, Canada N8W 5J7 Email: aco-web@cogeco.ca http://home.cogeco.ca/~aco-web/books.htm</p>
<p><i>ABCD in Action: When People Care Enough to Act</i> by Mike Green, Henry Moore, and John O'Brien</p>	<p>Inclusion Press 47 Indian Trail Toronto, ON M6R 1Z8 Canada 416-658-5363 www.inclusion.com www.mike-green.org/</p>

<p><i>All My Life's a Circle Using the Tools: Circles, MAPS and PATH</i> by M. Falvey, M. Forest, J. Pearpoint and R. Rosenberg</p>	<p>Inclusion Press 47 Indian Trail Toronto, ON M6R 1Z8 Canada 416-658-5363 www.inclusion.com</p>
<p><i>Circles of Friends</i> by Robert Perske illustrated by Martha Perske</p>	<p>Inclusion Press 47 Indian Trail Toronto, ON M6R 1Z8 Canada 416-658-5363 www.inclusion.com</p>
<p><i>Formal Individualization Systems: Their Potential and Limitations</i> Article in Crucial Times, July 1999 By Michael J. Kendrick</p>	<p>Kendrick Consulting International Michael J. Kendrick PhD Kendrick Consulting Services 4 Bullard Ave., Holyoke, MA USA 01040 413 533 3511 kendrickconsult@attglobal.net http://www.kendrickconsulting.org</p>
<p><i>From Dreams to Reality – Ideas and strategies for planning</i> Produced by Pave the Way Mamre Association</p>	<p>Pave the Way PO Box 949 MT GRAVATT QLD 4122 Ph: (07) 3291 5800 or 1300 554 402 pavetheway@mamre.org.au www.pavetheway.org.au</p>
<p><i>Home Sweet Home</i> A resource booklet developed in the community of St. Marys Ontario to address the need for people with limited Incomes and Disability to have security of home.</p>	<p>Community Living St. Marys and Area 300 Elgin Street East PO Box 1618 St. Marys, Ontario N4X 1B9 Phone: 519-284-1400 Fax: 519-284-3120 Email: info@communitylivingstmary.ca http://www.communitylivingstmarys.com/</p>

<p><i>Innovation in the provision of accommodation support services for Western Australians with a disability</i></p> <p>Prepared by Deirdre Croft on behalf of the Accommodation Think Tank and ACROD WA</p>	<p>http://www.ideaswa.net/Projects/documents/INNOVATIONinACCOMMODATIONSUPPORTCasestudiesFinalVersion270306.pdf</p>
<p><i>Kirby's Lane: A Well Travelled Path</i></p> <p>Stories collected and written by Charlotte Dingwall</p>	<p>Community Living Ontario http://www.communitylivingontario.ca/docs/</p>
<p><i>My Life, My Choice</i> (a DVD)</p>	<p>Inclusion Press 47 Indian Trail Toronto, ON M6R 1Z8 Canada 416-658-5363 www.inclusion.com</p>
<p><i>Path: Planning Possible Positive Futures</i> <i>Planning alternative tomorrows with hope for schools organizations, businesses and families</i></p> <p>by Jack Pearpoint, John O'Brien, Marsha Forest</p>	<p>Inclusion Press 47 Indian Trail Toronto, ON M6R 1Z8 Canada 416-658-5363 www.inclusion.com</p>
<p><i>Person-Centered Planning with MAPS and PATH</i> <i>A Workbook for Facilitators</i> by John O'Brien & Jack Pearpoint</p>	<p>Inclusion Press 47 Indian Trail Toronto, ON M6R 1Z8 Canada 416-658-5363 www.inclusion.com</p>
<p><i>Person-centred Planning</i> by Dr. Beth Mount</p>	<p>Capacity Works, LLC P.O. Box 271, Amenia, NY 12501-0271 USA Email: capacityworks@aol.com www.capacityworks.com</p>

<p><i>Safe & Secure, RDSP Edition: 6 Steps to Creating a Good Life for People with Disabilities</i></p> <p>by Al Etmanski with J. Collins and V Cammack</p>	<p>Planned Lifetime Advocacy Network (PLAN)</p> <p>Suite 260 – 3665 Kingsway Vancouver, BC V5R 5W2 604.439.9566 Email: inquiries@plan.ca</p> <p>www.plan.ca</p> <p>Book also available at: www.rdsp.com</p>
<p><i>Stronger Together – Ideas, reflections and suggestions about networks of support</i></p> <p>by Bruce Kappel.</p>	<p>Support and Trustee Advisory Services 6695 Millcreek Drive, Unit #1, Mississauga, Ontario L5N 5R8</p> <p>905-542-2694 ext. 2312</p> <p>http://www.supportandtrusteeadvisoryservices.ca/store.htm</p>
<p><i>We Come Bearing Gifts: The Story of Deohaeko Support Network</i></p> <p>by Janet Klees</p>	<p>Deohaeko Support Network Rougemount Co-operative Homes, 400 Kingston Road, Pickering, Ontario L1V 6S1</p> <p>905-509-5654 http://www.legacies-inc/</p>

IRM Forum Speakers/Presenters

Lucille Roch, Deputy Minister, MCSS (Toronto session only)
Colette Kent , MCSS Developmental Services Branch
Elizabeth Yeigh , MCSS Developmental Services Branch
Archie Dowker , South-East Grey Support Services
Beth French , Brockville and District Association for Community Involvement
Marg McLean , Community Living St Mary's and Area
Xavier Noordermeyer , Community Living Windsor

Presentation materials are available through MCSS, Developmental Services Branch, as well as on Ontario Telehealth Network Public Archives Videoconference Listing at <http://webcast.otn.ca:80/archives.html> .

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SOME RELEVANT ONTARIO LINKS

<p>ARCH: A Legal Resource Centre for Persons with Disabilities (Ontario) www.archlegalclinic.ca</p>	<p>Families Matter Cooperative www.familiesmattercoop.ca</p>
<p>Communities Involvement Legacy Homes (Non-profit, charitable housing corporation created by the Brockville and District Association for Community Involvement) www.cilh.ca</p>	<p>Individualized Funding Coalition of Ontario www.individualizedfunding.ca</p>
<p>Community Legacies Inc. www.legacies.ca</p>	<p>Lifetime Networks Ottawa (LNO) www.lifetimenetworks.ca/</p>
<p>Community Living Ontario www.communitylivingontario.ca</p>	<p>Ontario Adult Autism Research and Support Network (AROHA Information) www.uoguelph.ca/oaar/entities.shtml</p>
<p>Deohaeko Support Network Rougemount Co-operative Homes 400 Kingston Road, Pickering, ON L1V 6S1 905-509-5654</p>	<p>OASIS (Ontario Agencies Supporting Individuals with Special Needs) www.oasisonline.ca/</p>
<p>Extend-A-Family www.extendafamily.ca</p>	<p>Ontario Coalition for Inclusive Education http://www.inclusiveeducation.ca/</p>
<p>Facilitation Leadership Group www.facilitationleadership.com</p>	<p>People First Ontario www.peoplefirstontario.com/index.html</p>
<p>Families for a Secure future http://www.familiesforasecurefuture.com/</p>	<p>Respite Services for Families (Consists of agencies funded by the Ministry of Community and Social Services and the Ministry of Children and Youth Services) www.Respiteservices.com</p>
<p>Family Alliance Ontario c/o Hamilton Family Network 22 Leeming Street, Hamilton, ON L8L 5T3 (Publishes The Compass) www.family-alliance.com</p>	

SOME RELEVANT NATIONAL LINKS

<p>Canadian Association for Community Living www.cacl.ca</p>	<p>Planned Lifetime Advocacy Network (PLAN) Suite 260-3665 Kingsway Vancouver, BC V5R 5W2 Canada Bus: (604) 439-9566 inquiries@plan.ca http://www.plan.ca/</p>
<p>Center for Inclusion, Toronto www.inclusion.com</p>	<p>Registered Disability Savings Plan http://www.rdsp.com</p>
<p>Council of Canadians with Disabilities www.ccdonline.ca</p>	<p>Roeher Institute, Canada – National Disability Research Institute www.roeher.ca/english/about/about.htm</p>
<p>Community Living Research Project, School of Social Work, UBC www.communitylivingresearch.swfs.ubc.ca/index.php?id=11720</p>	<p>Vela Microboard www.microboard.org</p>

SOME RELEVANT INTERNATIONAL LINKS

<p>Consumer Research Unit Inc. Queensland Australia Publisher of Crucial Times</p> <p>www.cru.org.au</p>	<p>John O'Brien Publications http://thechp.syr.edu/rsapub.htm</p>
<p>Department of Ageing, Disability and Home Care: Models of Supported Accommodation for People with a Disability (DADHC) http://www.dadhc.nsw.gov.au/NR/rdonlyres/FAE124D6-C6EA-4EE8-8686-30DDB98ABB4E/1257/AccommodationPaperVersion13_1_05.pdf</p>	<p>Kendrick Consulting International Michael Kendrick Publications and Resources http://www.kendrickconsulting.org</p>
<p>Disabled and Alone/Life Services for the Handicapped, Inc. (Life Services) http://www.disabledandalone.org/</p>	<p>Social Role Valorization: value-based training organization www.socialrolevalorization.com</p>
<p>Information on Disability and Employment Support Western Australia http://www.ideaswa.net/Projects/IDEASWAProjectsThinkTankResources.php</p>	<p>The Arc Non-profit community based organization of, and for, people with intellectual and developmental disabilities. Good resource for Planning – has many chapters. http://www.thearc.org/</p>

APPENDIX C: SAMPLE DOCUMENTS & TOOLS

Many of these resources have been provided by individuals, families and agencies as part of their contribution at the Forums. We thank all of you who contributed. In order to provide documents and tools that would be helpful to a broad range of situations across the province, we have taken some of the documents provided and modified them in order to make the tool more generic without identifying the agency or family/individual involved.

1. About Planning

a) The Planning Process

The following is one agency's Guide to carrying out the planning process.

Guide to the Planning Process

The purpose of this guide is to:

- Provide a resource for planners that sets the tone and tempo of planning and ensures the person's voice is the loudest in the planning process.
- Provide a resource for planners to ensure consistency where it is important in the planning process.
- Show how planning and support services interact.

Why Plan...

Everyone wants a good life. We all need people – usually a combination of family, friends, acquaintances and professionals – to help us have that life. One of the things that some of these people do is help us to dream about our futures and where we want to be. We explore these things together over coffee, on the telephone, in short conversations or long, heartfelt discussions. Likely, we wouldn't consider many of these things "planning", but they are what help us to mentally map out what steps can happen to move toward what we really want in life, both in the future and today.

Often, people who are labelled with disabilities haven't had the opportunity in life to do this in the natural ways many people experience (due to lack of relationships, non-traditional forms of communication, etc). So, "planning" becomes a more formalized and intentional process; for example, there's often a paid facilitator involved. This "planning" is a powerful tool to capture someone's voice and to have a clear understanding of what they want. It also outlines the action steps of who will do what by when to get there.

Simply put, planning provides everyone – the person, family, friends and professionals – with the direction and the action plan needed to move toward what the person describes as their “good life”.

Our Beliefs about Planning and Facilitation...

We believe that good planning facilitation...

- ✓ values the **person’s voice first**, with input from family, friends, and paid people. Regardless of how a person communicates, good planning ensures that the person directs the planning because it is centered around them.
- ✓ is **different for each person**. There is not a single “format” that must be followed. Planning had room to grow and does not just happen in meetings but is updated over time and recognizes people’s changing lives and needs.
- ✓ **reflects the person’s interests, hopes, fears and dreams** and is not driven by where the funding might come from.
- ✓ **builds on the person’s strengths** and abilities.
- ✓ acknowledges that **each person has a unique history** of experiences and stories that has shaped who we are.
- ✓ **leads to action** by having clear goals and ways that they will be achieved. Planning identifies obstacles and steps to overcome them.
- ✓ **explores resources** in the community that people can use.
- ✓ **uses respectful language** that avoids jargon and social service terms.
- ✓ creates **opportunities for service providers to be creative** in how someone will achieve the goals in their plan.
- ✓ recognizes that you will never have the time you really need and you will never have the money you really need. Therefore, **commitment** is the necessary ingredient. Time and money just make it easier.
- ✓ recognizes the **honourable and valued role** that both family/friends and paid people play in people’s lives.

Our Beliefs about Planning Facilitators...

We believe good planning means that the role of the Planning Facilitator will include...

- developing a trust relationship with the person (it is an exception when this is not important)
- capturing someone’s thoughts and feelings in a plan, not being a participant in the planning

- offering encouragement
- not necessarily doing the planning, but rather identifying and supporting the person or someone in their life to lead the planning process
- using a variety of planning tools and resources
- sometimes struggling between personal values and principles and what the person or family wants
- doing no harm
- being true to the values of planning, while not judging others for different ways of seeing the world
- regularly connecting with other planners to avoid getting “stale” and to ensure that the most and best contacts are being made for the person
- connecting, digging, connecting

Spending Time Together Getting to Know Each Other...

Giving Information...	Getting Information...	Principles to keep in mind while giving and getting information...
<ul style="list-style-type: none"> • what we have to offer (different ways of planning) • givens/ beliefs about planning • we're funded to provide planning service to people with label of developmental disability • we don't plan for 24 hour segregated services • planning means a commitment to action • natural supports, support circles • set culture of who's at the meetings, ensuring the person's voice is the loudest • option of advocacy • possible referrals will be made • information about all services, including CSCN role • funding process • resources that may be helpful i.e.: videos 	<ul style="list-style-type: none"> • the basics such as birth date, phone number/address (initial contact form) • listening to the story and what the person is looking for, including what's important now, who's involved in both paid and non-paid roles, and a sense of long term vs. immediate needs • brief history • how are you feeling? • are you safe? • interests • release of information 	<ul style="list-style-type: none"> • you don't want to overwhelm people with information, so only give what's needed • start thinking from the very beginning about which planning process/style makes sense for that person • this time together is about relationship and building trust, comfort level. It's about listening and people feeling safe. • stay away from lingo • individual approach for each person • be aware and respectful of the family and/or community's culture

• family wisdoms booklet		
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Capturing the Plan on Paper

NOTE: THE PERSON DOES AS MUCH OF THE ACTUAL CAPTURING AS POSSIBLE THROUGH THE USE OF SYMBOLS, PICTURES, VIDEO, ETC.

The main component of the plan is the **LIFE PLAN**. The Planning Facilitator helps explore all community options and resources, including the involvement of family, friends, and neighbours to help the person get what they need. If a request for service is made after all community options have been explored, a **SERVICE PLAN** is developed. A **SERVICE PLAN** will include:

1. Service Request
2. Preferences for how service is to be delivered
3. Relationship with Service Provider
4. Supporting the person to monitor their supports and services
5. In high risk/emergency situations, immediate referrals for service are made.

Life Plan

There is a wide range of things that someone may want to explore in their life; the following is merely a sample of some areas that they may wish to be captured.

Who is the person?	Goals
<ul style="list-style-type: none"> • Values (stories indicating why a person believes something) • Who is the person? What are their gifts? • History (stories that mark the journey in pictures, words) • Likes/Dislikes • Dreams/Nightmares • Strengths 	<p>What the person wants in terms of...</p> <ul style="list-style-type: none"> • Dreams • Relationships/Friends • Emotional growth • Sexuality • Spirituality • Education • Material possessions • Learning new things • Finances • Employment • Volunteerism • Where and with whom they live, etc
<p>A Snapshot of Today...</p> <ul style="list-style-type: none"> • Present situation • What is important to the person today and why (routine, decision making) • How the person and their family feel about what's happening • Role in Community • Places/community map 	<p>Anything Getting in the Way...</p> <ul style="list-style-type: none"> • Recognition of obstacles and ways to overcome them • Unresolved Issues (things we don't know about the person or ways to overcome obstacles)

<p>People...</p> <ul style="list-style-type: none"> • Who loves this person? • Who is important to the person? • Relationship map • How family and friends may be involved in offering/providing support 	<p>Communication...</p> <ul style="list-style-type: none"> • When the person says/does this, we think it means...
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Service Plan

1. Service Request

- Basic Information (DOB, contact names, etc.)
- Goals from Life Plan which Service is requested to help achieve
- Other things the person wants help with...

<ul style="list-style-type: none"> • Physical Support (lifting, transferring, getting dressed, etc.) • Mealtimes • Personal Care • Communicating • Errands (groceries, banking, etc.) • Medical 	<ul style="list-style-type: none"> • Personal Finances • Chores (laundry, cleaning, etc.) • Care of pets • Transportation • Emergencies • Coordination of services • Monitoring support budget • Hiring, co-supervision, training
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2. Preferences on how service is to be delivered

How the person wants service to be delivered and how much support the person wants in terms of...

<ul style="list-style-type: none"> • Physical Support (lifting, transferring, getting dressed, etc.) • Mealtimes • Personal Care • Communicating • Errands (groceries, banking, etc.) • Medical • Personal Finances 	<ul style="list-style-type: none"> • Chores (laundry, cleaning, etc.) • Care of pets • Transportation • Emergencies • Coordination of Services • Monitoring support budget • Hiring, co-supervision, training
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As well as the person's preferences in terms of...

- Worker's relationship with the person
- Worker's relationship with other's in the person's life (family, friends)
- Privacy

- Scheduling
- Possessions

3. Relationship with Service Provider

- Qualities wanted in workers
- Involvement in co-supervision
- Employment relationship, ways to hire workers

4. Supporting People to Monitor their Services

The Planning Facilitator will help the person to identify the following things:

- Who the person wants to take the lead in the monitoring process (i.e.: self, friend, family).
- What skills and resources are needed by that person to effectively monitor the supports and services being received.
- How the skills and resources will be provided, in what timelines, etc. to the identified person
- How often and/or under what circumstances the person wants to review their services.
- Who will initiate and how reviews will be initiated.

The monitoring plan may include the person looking at such things as:

- what services and supports they indicated they wanted
- has it happened?
- has it happened in the way that they wanted?
- if it hasn't happened, is it still relevant or important?
- do they want to do something about the things that haven't happened?
- if so, ways to address any concerns
- the things that are working well and ways to share their satisfaction

NOTE: *In absence of a lead person being identified, the Facilitator will take on the role of helping the person to monitor the services that they are receiving. This would be a temporary role until an alternate lead person could otherwise be identified. The monitoring plan will identify how this will happen.*

Choosing a Service Provider

The person takes their completed Plan to service providers: *“Here’s what I want; how would you do it and how much will it cost?”*

Process to include:

- Make contact by phone with service provider (may be done by the person or family)

- Send the Plan to the service provider
- A clear request is made of what is to be quoted. Will include costing items such as training, supervision, mileage rate, worker rate, worker categories, transition costs, seasonal costs, etc.
- Service provider then decides the next step in how they want to get more information (i.e.: meet with the person and/or planner)
- Service provider forwards a complete budget quote for each description of how service will be provided (there may be many scenarios offered to the person by the service provider)

Developing Agreements

Once the person has found a service provider, the Planning Facilitator will help them to ensure that a written agreement is developed. This process includes assisting the person and their family to identify what is important to them and may include things like:

- Funding portability
- How decisions will be made
- How conflicts will be resolved
- How communication will happen
- Accountability

Ongoing Planning Facilitation

Planning is ongoing. It should be a process that is alive, growing and marked by accomplishments and action.

Evaluation of the Planning Process

Evaluation of the planning process will be regular and ongoing, and will include:

- The Plan Review tool developed
- Feedback from person
- Feedback from service providers (i.e.: Does the plan give enough information in a clear way in order to develop and implement services?)
- Internal agency evaluation (i.e.: Are the givens of planning being followed, etc.)

Source:

Community Living St. Marys and Area
<http://www.communitylivingstmarys.com/>

b) Sample Planning Tools

P A T H

Planning Alternative Tomorrows With Hope

Developed by John O'Brien, Jack Pearpoint, and Marsha Forest

- PATH is a systematic creative planning tool that begins by creating a vision, then specifies actions to get moving on the Journey to desirable future.
- PATH is a powerful tool. It makes the implicit - explicit. It takes out the "whining" and asks bluntly if people are willing to do the hard work to invent their future.
- PATH plans backwards. It begins by creating a Future Dream (North Star), then focuses on creating a real positive and possible future.
- PATH is a tool - adaptable to individual, family or organization situations (large and small). PATH relies on the creative tension set up by exploring the future and contrasting it with the present (Now).
- PATH produces a step-by-step grounded action plan which locks in individual commitments and enrolls other important actors. The Final Step is the "First Step" which begins immediately. If Pathfinders are truly committed to moving towards THEIR dream (North Star), an enthusiastic action plan emerges which begins now.
- PATH is not for the faint of heart as it truly asks "do you want to make change happen?" PATH is not easy. PATH is powerful, challenging and real. It is an action oriented, colourful, co-facilitated plan of action.

Book available from:

Inclusion Press
47 Indian Trail
Toronto, ON M6R 1Z8 Canada
416-658-5363
www.inclusion.com

2. About Funding, Housing, and Sustainability

a) About Housing and Ownership

Types of Ownership

Resident status: ownership or tenancy options we have heard about		
<p>FAMILY /PERSONAL OWNERSHIP OPTIONS</p> <ul style="list-style-type: none"> • Family owns home • Individual owns home (may be in trust) • Multiple owners own home • Investors own home • Investors and individual co-own home 	<p>OTHER OWNERSHIP OPTIONS</p> <ul style="list-style-type: none"> • Home held by a trust (Living – Intervivos) • Home held by a trust (Discretionary) • Home held by a trust (Community Not for Profit Housing Trust with Board of directors, incorporated) • Home held by a trust, managed by a circle/microboard • Individual shares home ownership 	<p>RENT OR LEASING OPTIONS</p> <ul style="list-style-type: none"> • Life lease held by person • Not for Profit Coop Housing Membership • Private Coop Housing membership • Individual as tenant • Individual shares tenancy • Individual is tenant of agency on an agency head lease

Affordable and Accessible options for Creating a Home

Home Sweet Home is a resource booklet that was developed in the Community of St. Marys, Ontario to address the need for people with limited incomes and disabilities to have security of home. The booklet covers the following topics:

- Planning what you want
- Supports to live in your home
- Security of Home through Home Ownership
- Other Ways to Own a Home
- Security of home without Ownership
- Using Trusts to Protect Security of Home

For a copy of this booklet, please contact:
 Community Living St. Marys and Area
 Box 1618
 St. Marys, Ontario N4X 1B9
 Email: info@communitylivingstmarys.com
 Phone: 519-284-1400
<http://www.communitylivingstmarys.com/>

b) About Funding

Individualized Residential Model Initiative Guidelines

The Individualized Residential Model provided funding in 2007-08 to support people to live in individually-tailored residential arrangements.

Below are the 2007-2008 guidelines for proposals. If future funding is announced by the Government of Ontario, a proposal for individualized residential supports through the IRM (Individualized Residential Model Initiative) will most likely require elaboration on each of the elements below.

How to develop a proposal

Eligible individuals or their families work with a service provider or transfer payment agency to develop a detailed proposal that explains:

- the residential model that is being proposed
- how the funding requirement will address the individual's residential support needs, and
- how the proposal meets the evaluation criteria (see "How proposals are evaluated" below.)
- who will act as the lead agency and be responsible for providing the agreed supports to the person

How proposals are evaluated

To make sure that the review process is done consistently, the ministry has established an evaluation process using weighted criteria. Proposals that best meet the criteria and fit within the community's planning requirements will be considered for funding.

For the 2007-2008 proposal request, eligibility criteria included the requirement that an individual be in an existing and funded residential situation, or be identified on the community priority list. This may or may not be the case, but it will be important to identify what makes the person's and the family's needs a priority at the time of submission. Agencies and local planning tables have a list of priorities for residential response, so your TP partner will need to assist in this piece of the proposal.

Here are the criteria against which proposals will be evaluated. (The weight is indicated by the number in the brackets.)

Intent (15)

- The individual, the family (if possible) and the service provider have worked together to develop the proposal.(you will need to talk here about the

development process, and the relationship and roles of the person, family and agency in developing the proposal and the support approach)

- The proposal takes a person-directed approach and includes the supports needed to meet the individual's capabilities and needs.

Fit with community need/plan (15)

- The proposal takes into account the needs of the community and fits with local priorities, goals and objectives.

Governance and accountability (20)

- The proposal outlines the roles and responsibilities of each of the parties involved in the initiative, including accountability and reporting requirements as applicable
- The lead agency accepts responsibility for ensuring on-going contact with the individual, the residential network (i.e. all parties providing residential support) and outside community resources, where appropriate. The usual service delivery accountability requirements apply.
- Where appropriate, the proposal identifies relevant safety measures that will be implemented (e.g. staffing schedules, competencies).
 - The proposal shows compliance with applicable legislation (e.g. health and safety legislation, residential tenancy legislation, building code and municipal requirements).

Service Provider Considerations (20)

- If the proposal is for an individual who is moving from an existing ministry-funded residential space to an innovative model:
 - The lead agency agrees to keep the vacancy open to allow for a transitional period of time. (Although the length of time will be determined on a case by case basis, generally the time should not be less than three to four months.) This provides the time needed to make sure that the new living arrangement is suitable and sustainable.
 - The service provider agrees to continue to provide the support services for the individual or has worked with the person to identify a suitable lead agency as appropriate.
 - The proposal identifies a lead agency who is responsible for assuring accountability of funds and service outcomes

Funding (10)

- Funding for the initiative should be managed within the context of the Regional Office annual residential targets and the amount of funding available.
- If the proposal is for an individual who is moving from an existing ministry-funded space to an innovative model, the proposed model must:

- Be fully manageable by the service provider and the local service system
- Be within the Regional Office's budget (including meeting annual residential targets), and
- Not exceed the current residential costs for the individual.

Sustainability (20)

- The proposal addresses:
 - How sustainability will be managed over time
 - What steps (or process) will be taken to review sustainability on a regular basis, and
 - How changes will be implemented as required

Other Potential Funding Sources

MINISTRY OF COMMUNITY & SOCIAL SERVICES PROGRAMS

Ontario Disability Support Program (ODSP)

- **Income Supports** helps people with disabilities who are in financial need pay for living expenses, like food and housing.
- **Employment Supports** to help people with disabilities who can and want to work prepare for and find a job.
- Individuals and their families who are receiving ODSP Income Support, may also be eligible to receive other benefits and supports including:
 - health benefits, such as prescription drug and dental coverage
 - disability-related benefits, such as help to pay for hearing aids
 - employment incentives and benefits, such as help to pay for child care costs or items you need for work
 - housing-related benefits, such as help to pay for emergency plumbing repairs
 - Transition Child Benefit.

Passport

- Community Participation Support
- Recipients may use up to 10% of their funding for planning

Special Services at Home (SSAH)

- Provides funding directly to families so they can purchase services to provide personal development and relief support to children and adults with a developmental disability and children with a physical disability.
- Can be used for personal development and growth, and respite

FEDERAL GOVERNMENT PROGRAMS

Families and agencies may wish to apply to federal government grant and loan programs that help to establish individualized residences for people with disabilities. Where appropriate, regions may encourage individuals, families, and/or agencies to apply for these programs.

Registered Retirement Savings Plans – Home Buyers’ Program

- The Home Buyers’ Plan is a program that allows people to withdraw up to \$20,000 from their registered retirement savings plan (RRSPs) to buy or build a qualifying home for themselves or for a related person with a disability.

<http://www.cra-arc.gc.ca/tax/individuals/topics/rrsp/hbp/menu-e.html>

Residential Rehabilitation Assistance Program (RRAP)

- Canada Mortgage and Housing Corporation (CMHC) provides forgivable loans through the Residential Rehabilitation Assistance Program (RRAP) to help homeowners or private entrepreneurs develop existing residential properties to accommodate a secondary, self-contained unit.
- This CMHC program offers families, agencies or landlords who are less able to use their own financial resources, the opportunity to access \$25,000 - \$28,000 in one-time funding to help them build a self-contained secondary suite in/on their existing residential property.

<http://www.cmhc.ca/en/co/prfinas/>

Enabling Accessibility Fund

- The fund offers \$45 million over three years, beginning in 2007/08, to contribute to the cost of improving physical accessibility for persons with disabilities.
- Non-governmental organizations such as community-based groups and non-profit organizations (registered charitable organizations) are eligible to apply and receive funds for various uses, including the renovation of buildings.

http://www.hrsdc.gc.ca/en/disability_issues/eaf/call2008/index.shtml

MINISTRY OF HEALTH AND LONG-TERM CARE PROGRAMS

(Through Local Health Integration Network)

Community Mental Health Providers

- Offer community based supports to individuals with a developmental disability who also have a diagnosable mental health need
- Funding is for:
 - Case management
 - Rehabilitation/Recovery Supports
 - Supported Housing Units and Rent Supplements

Community Care Access Centre (CCAC)

- Based on medical assessment and referral, offers:
 - Personal Attendant Care in the home
 - Nursing/Homemaking/Professional Services in the home

<http://www.ccac-ont.ca/>

MINISTRY OF MUNICIPAL AFFAIRS AND HOUSING PROGRAMS

- Administered by the Municipality, offers a range of affordable housing based on income level, including:
 - Housing units and rent supplements
 - Seniors' supported housing units

<http://www.mah.gov.on.ca/site4.aspx>

c) About Sustainability

Using Trusts to Protect Security of Home

Security of home for the person who has an adequate income and is able to buy their home is rather straight forward. However, some people do not want the responsibility of home ownership. Others are unable to enter into the contractual agreements necessary to hold a mortgage, or do not the financial means to purchase a home. This does not mean that long Term security of home is not important. It does mean that families are finding ways to provide long term security of home to their sons and daughters as they become adults. They are considering what their role should be in home ownership, including:

- Families are leaving the family home to their child who has a disability
- Siblings are purchasing a home for their brother or sister then renting it to them
- Families are forming partnerships and purchasing a home for their children to live in as housemates

With the advice form an informed lawyer, it is possible for families to figure out ways to hold a house in trust for their son or daughter.

The information above is not intended to take place of advice from legal representation. It is intended to open the door of possibility and have families begin to think about and discuss what their role may be in assisting with and creating security of home.

The above information was taken from the booklet, Home Sweet Home which was developed in the community of St. Marys Ontario to address the need for people with limited Incomes and Disability to have security of home.

For a copy of this booklet, please contact:

Community Living St. Marys and Area
Box 1618

St. Marys, Ontario N4X 1B9

Email:

info@communitylivingstmarys.com

Phone: 519-284-1400

<http://www.communitylivingstmarys.com/>

Using Legal Entities to Enable Sustainability

There are lots of ways to create a sustainable entity, and there are different ways of going about this. Here are two examples:

AROHA

The Maori word "aroha" from Aotearoa/New Zealand is proposed as the generic term for incorporated entities for personal empowerment and support (that are similar to "microboards" in British Columbia or "self-directed support corporations" in various American states). Aroha means the various qualities and values that are needed in a caring circle of friends. Its meanings include affection, love, charity, compassion, empathy, concern, trust, pity, understanding and true friendship—all in active ways, not just ideas or feelings.

An Aroha can have legal powers to:

- a) receive and administer individualized funding directly from Government
- b) administer trust funds set up by families
- c) be the employer of record for support workers
- d) own and maintain property such as the home of the person with a disability
- e) make contracts and agreements with independent service providers and consultants
- f) make contracts with facilitators and agencies that may provide direct and infrastructure supports
- g) carry liability insurance.

Source:

Ontario Adult Autism Research and Support Network (AROHA Information)

www.uoquelp.ca/oaar/entities.shtml

Vela Microboard

A Vela MicroBoard is formed when a small group (micro) of committed family and friends join together with a person with challenges to create a non-profit society (board). Together this small group of people addresses the person's planning and support needs in an empowering and customized fashion. A Vela MicroBoard comes out of the person centred planning philosophy and is therefore created for the sole support of one individual.

Essential Components of a Vela Microboard

- The process must be focused on the dreams and wishes of the person for whom the board is being created
- All MicroBoard members must be in a close, voluntary, and committed relationship with the person for whom the board is being created;
- These close relationships are the foundation of the board and must be honoured above all other activities.

Source:

<http://www.microboard.org/>

Advocacy Resource Centre for the Handicapped (ARCH)

ARCH Disability Law Centre is a specialty legal aid clinic serving the province of Ontario and is dedicated to defending and advancing the equality rights of persons with disabilities. ARCH was founded in 1979 under its previous name, Advocacy Resource Centre for the Handicapped (ARCH). ARCH is primarily funded by Legal Aid Ontario. ARCH is a not-for-profit charitable organization.

ARCH provides services to Ontarians with disabilities in many ways, through law reform and policy initiatives, community development, legal advice and referrals, public legal education, and litigation.

Source:

**ARCH: A Legal Resource Centre for
Persons with Disabilities (Ontario)**

www.archlegalclinic.ca

Supported Decision-Making

Families walk a balancing act between respecting choices and ensuring the safety and well-being of our family members. This balancing act often finds families erring on the side of safety and caution. Ensuring choice for our relatives is both a stress as some control is released, as well as freedom for families and individuals as they begin to explore decision making. For our relatives to become good at making the decisions in their lives, they need to:

- a) Be respected for their inherent decision-making abilities
- b) Develop authentic decision-making voices
- c) Receive support where necessary
- d) Have genuine choices and options
- e) Make decisions based on those choices
- f) Have alternatives to legal guardianship
- g) Be able to make mistakes

Supported decision-making is how the majority of people make decisions. We face a dilemma, look at the options, gather information, talk to people and ask for support in decision follow-through. *Good decision-making is supported decision-making.*

There are three areas of decision-making that affect your relative's life:

- Health/Medical
- Financial
- Personal care

Most importantly, families have the opportunity to develop a Supported Decision-Making Agreement. In British Columbia, representation agreements are legally-recognized documents that outline assisted and substitute decision-making. However, families can create their own supported decision-making agreements that carry a moral and intentionally-authority.

Source:

The ideas and concepts above are taken from [A Good Life for you and your relative with a disability](http://www.agoodlife.org/) by Al Etmanski
<http://www.agoodlife.org/>

3. Documents & Agreements between Person/Family and Agency

a) About Service Agreements

Service Agreement or Service Contract Tip Sheet

Please Note:

This list is a starting point and can help you as a guide when you are discussing the supports and services that you are buying. We encourage you to communicate often to the people and agencies' offering you supports and services to make sure your needs are being met in the best possible way.

What is a Service Agreement or Service Contract?

It is a formal agreement between someone who is **buying** supports or services and someone who is **offering** supports or services. Before deciding the supports and services you are seeking, your values and goals should be considered and discussed. Usually the agreement or contract is in writing. A Service Agreement or Service Contract benefits everyone. It benefits those who are buying the supports or services, and those who are offering them, because it makes clear the responsibilities of everyone involved. The Service Agreement should identify the following areas:

1. Contact Information

- Name
- Title
- Telephone #
- E-mail address

2. Description of Supports and Services

- Information including # of hours, day(s), date(s), and location if necessary.
- Specific activities.
- Transportation required/provided.
- Roles, Responsibilities.

3. Duration of the contract/agreement

- Start date?
- How is the contract extended or renewed?
- End date?
- Trial Period? Terms? Duration?
- What happens at the end of the trial period?

4. Cost

- Supports or Services expected.
- What happens if.... ('I can't attend,' vacation, illness, etc)?

5. Payment of supports and services

- Invoicing procedures (How often to send in? Required signatures? etc.).
- Contact information including mailing address, fax #, e-mail address, and contact name.

6. Notice of Termination

- How to end the agreement or contract before the end date?
- Who can end the agreement or contract before the end date

7. Complaint and Conflict Resolution process

- How to make changes to your service agreement/contract?
- How to decide if agreement/contract needs changing?
- How to raise concerns/issues?

8. Review of the supports and services

- What are the responsibilities and expectations of those buying the supports and service and those offering the supports and services?
- How often?
- Who is involved?
- How do we measure progress, and success?

Source:

Developmental Services Toronto
<http://www.dsto.com/>

Sample Service Agreements

THE SERVICE AGREEMENT BETWEEN AGENCY, FAMILY AND PERSON SOME OF THE KEY ELEMENTS TO BE INCLUDED

Below are some of the areas which would likely need to be included in a Service Agreement or Contract between a Developmental Services Transfer Payment agency (identified as a Lead Agency) and a family and / or person. This is a guideline only, and may not cover all the possible elements. Families and agencies would benefit from considerable discussion around the roles and responsibilities, but from what we heard at the Forums, it is important to have the agreement 'on paper', once all the details have been thought through and agreed to make sure everyone is clear, and that roles and responsibilities can be reviewed and altered as needed as circumstances and needs change.

Date of agreement:

Names of all parties: (Mother name) and (Father name), Lead Agency/TP name and – (as relevant, and as they are competent to sign) Name of Person Being supported

Outline of General high level agreements

- (a) The Ontario Ministry of Community and Social Services has agreed to provide funding (identify amount and the Individualized Residential Model initiative details)
- (b) The family has made a proposal which was accepted (attach proposal)
- (c) Identify general arrangements in the plan (so the physical set up, is it owned or rented) and the support arrangement (i.e. Support staff , supportive roommates, other roommates)
- (d) (TP agency) has agreed act as the IRMI Funding transfer payment agency between the Family and MCSS upon and subject to the terms of this agreement.
- (e) (Person being supported) has agreed (may be agreement about payment of rent, of support workers)

1. Responsibilities of the (Family Name as above) and the TP Agency (as above)

a) TP agency agrees to:

List all responsibilities agreed to be taken on by the TP agency, which could include, but not be limited to:

- Act as the transfer payment agency (according to rules and regulations of the IRMI)

- Maintain all books and records and account to the regional office of MCSS on expenditures as required
- Receive funding and (specify whether they will administer and provide support staffing, or whether the funds will be released to the Family as above for payment of support staff or for other roles
- Identify roles with administrative assistance, financial accountability requirements, reporting requirements regarding accountability, health and safety
- Specify roles with regard to hiring, orientation, training, supervision of support staff
- Specify any other services to be offered by the TP agency
- Specify how the responsibilities and roles will be monitored and reviewed and how often, and by whom
- Specify how often conferences, meetings, planning sessions regarding TP and Family will be scheduled
- Collaborate and develop a working partnership with the Family, working through any disagreements according to the process agreed upon

b) The (Family name as above) agrees to:

List all responsibilities agreed to be taken on by the Family, which could include, but not be limited to:

- Cooperate with the TP agency so that it can meet any reporting and accountability obligations to the Ministry related to the funded IRM proposal and its vision and principles
- Collaborate and develop a working partnership with the TP agency, working through any disagreements according to the process agreed upon
- Participate in hiring, selection of support staff (give details of the responsibility and involvement of family quite specifically, whether TP is hiring, or whether family is hiring self employed independent contractors)
- Be aware of and comply with any relevant legislation related to hiring of support staff as self employed independent contractors (you can specify if you wish)
- Meet all reporting requirements set out by TP agency related to IRMI funding and staffing
- Identify role of family with actual payment of expenses for the housing unit, if they are making a contribution (i.e. Condominium costs, maintenance, upkeep)

- Identify role of family in receiving any payments from supportive roommates/houssharer/other residents
- Identify role of family in ensuring the standards/physical condition of the housing unit, only as this is relevant to a family or person in their own home (this one is important, as you need to be careful that the agency does not require the person or family to comply with standards which are not about an individual or family living situation, but about a 'group home' or other congregate setting)
- Identify specific roles/responsibility of the family (if any) in scheduling, coordinating and approving the remuneration of all Support Staff, choosing supportive roommates and overseeing any arrangements related to them
- Identify specific roles and responsibilities of the family related to the recruitment, hiring, training, payment and retention of support staff as self employed independent contractors

c) The Person (as relevant and based on their involvement in the following roles, which will vary)

- Cooperate with the TP agency so that it can meet any reporting and accountability obligations to the Ministry related to the funded IRM proposal and its vision and principles
- Collaborate and develop a working partnership with the TP agency, working through any disagreements according to the process agreed upon
- Participate in hiring, selection of support staff (give details of the responsibility and involvement of family quite specifically, whether TP is hiring, or whether family is hiring self-employed independent contractors)
- Be aware of and comply with any relevant legislation related to hiring of support staff as self employed independent contractors (you can specify if you wish)
- Meet all reporting requirements set out by TP agency related to IRMI funding and staffing
- Identify role of person with actual payment of expenses for the housing unit, if they are making a contribution (i.e. Condominium costs, maintenance, upkeep)
- Identify role of person in receiving any payments from supportive roommates/houssharer/other residents
- Identify role of person in ensuring the standards/physical condition of the housing unit, only as this is relevant to a family or person in their own home (this one is important, as you need to be careful that the agency does not require the person or family to comply with standards which are not about an

individual or family living situation, but about a 'group home' or other congregate setting)

- Identify specific roles/responsibility of the person (if any) in scheduling, coordinating and approving the remuneration of all Support Staff, choosing supportive roommates and overseeing any arrangements related to them
- Identify specific roles and responsibilities of the person related to the recruitment, hiring, training, payment and retention of support staff as self employed independent contractors

2. Processes and Expectations

You may want to identify here any agreed upon processes, or areas where you will build processes together which will achieve the goals of this agreement and the individualized residential situation. These processes might include such things as:

- a) Communication systems between all partners
- b) Development of a set of desired outcomes which will be used to evaluate the success of the partnership and the individual residential situation
- c) Specific reporting processes and tools and information exchange relating to financial accountability
- d) Processes for regular review of the agreement, the achievement of responsibilities, the effectiveness of the individualized residential approach in meeting the person's stated goals and needs

3. Remuneration of TP Agency

In this section, it will be indicated what the agreed upon percentage of the total IRMI allocation for the person the TP agency will be entitled to receive for fulfillment of obligations, role and responsibilities as indicated in the agreement. (There is a maximum of 10% of the total allocation allowed under IRMI guidelines, with the actual percentage to be determined between the TP agency, family and person, dependent on the responsibilities being taken on by each)

4. Limitation of Liability for TP agency

A statement agreed upon by all parties related to the IRMI funds being terminated or cancelled by MCSS, and related to any liability issues connected with self-employed independent contractors and supportive roommates, or other support staff who are not hired by the TP organization directly

5. Transition and Termination

Indicating the term of the agreement, how it can be terminated, and how it can be protected from termination (for example what should happen upon the death of one of

the family members, or the individuals, or the change of residence where the person is living)

6. Confidentiality

A statement that each party will maintain confidentiality around personal information related to the person, the family, the support staff, and specifically that this information will not be forwarded to the funder except to comply with any reporting regulations, or if required by law or other legal process.

7. Communication and Notices

Specific information about how any communication will be delivered, and the addresses of each of the parties signing the agreement, so it's clear.

8. Other inclusions

Witnessed signatures of person, family and TP designated signatory

Source:

Based on documents developed (to support an individualized residential arrangement) by a family and independent facilitator from ***Families for a Secure Future***
<http://www.familiesforasecurefuture.com/>

Typical Services Included in Agency Service Fee

Finance:

- Act as a bank/Transfer payment Agency to receive allocated support funds provided by the Ministry of Community and Social Services (MCSS) on behalf of the family
- Assist in the development of a budget
- Completion of Individual Cost Summary
- Assist with operating budget to ensure allocated funds remain available for implementation of the person's plan
- Provide all necessary forms (self-employed support worker invoices, etc)
- Flow funds through the processing of invoices (self employed support worker hours and other expenses) on an as needed basis including the use of Agency direct deposit or cheque system
- Ensure expenditures meet MCSS guidelines
- Contact MCSS on behalf of families for requests that fall outside of the cost summary
- Direct payment of bills to other services (i.e., Harmony in Action – a Windsor agency offering day and social programs) as requested by the family
- Provide monthly variance reports to the family
- Assist families in maintaining financial records and record keeping
- Maintain and monitor ongoing financial records for MCSS
- Maintaining proper records for audit purposes
- Assist with MCSS auditing procedures
- Complete and forward units of service to the Ministry on behalf of the family quarterly

Quality Assurance:

- Assist and support individuals, and their family to arrange, organize, coordinate and administer the supports needed to live in their house, enjoy their life and be active in their community
- Work in partnership with the family for the health, safety and security of the person's life
- Develop and maintain a supportive partnership with the family, individual and their self-employed support workers
- Assist with the establishment of policies and procedures as may be required to conform to MCSS regulations, policies, directives and all related requirements
- Assist families and self-employed support workers to be knowledgeable of MCSS guidelines, directives and requirements related to individualized support arrangements

- Develop the Personal Support Agreement and review on an annual basis
- Review outcomes at a minimum of every six months or more frequently upon request
- Work together with the family to ensure that MCSS directives, policies, practices, procedures and standards are maintained
- Forward Serious Occurrence information to MCSS
- Complete MCSS Individual Support Agreement (ISA)
- Maintain communication records on behalf of the family and individual as requested
- Provide information/referrals to specialized support services as needed (psychological, behavioural, medical)
- Provide guidance, counselling to families on addressing challenging needs and challenging support situations

Employee Related Matters:

- Maintain self-employed support worker file for family and MCSS reference including:
 1. criminal reference check
 2. valid standard First Aid/CPR certificate
 3. copy of reference checks
 4. signed copy of Self-Employed Worker/Parent Agreement
 5. drivers license
 6. valid vehicle insurance
 7. resume
- Provide CPR/First Aid training (material cost excluded)
- Offer opportunities for training as available (note direct cost of training would be an additional cost)
- Assist with the establishment, implementation, adherence and communication of policies, procedures and standards for self-employed workers to meet MCSS requirements
- Ensure self-employed support workers have appropriate skills
- Review self-employed support worker/family agreement yearly
- Maintain a pool of potential self-employed support workers for access by families on an as needed basis
- Assist with linking, interviewing, screening, and selecting of potential self-employed support workers as requested by the family
- Provide management guidance and direction in the orientation and supervision of self-employed support workers
- Assist with scheduling of the self-employed support worker as requested

- Maintain and review records in regards to self-employed support worker schedule of hours worked
- Provide management guidance and direction to the family to comply with required legislation (i.e.: Ontario Human Rights Code, Employment Standards Act etc.)
- To guide and assist families to ensure a safe work environment and ensure compliance with all Health and Safety legislation
- Assist in the development of emergency plans

Planning:

- Meet with the individual and family on a regular basis to provide planning support to ensure life experiences are as positive, rich and diverse as possible
- Review personal support agreement on an annual basis
- Facilitate coordination of total support funding (i.e.: individual support funding, SSAH, etc)
- Assist family to identify unmet needs and develop plans for required action as necessary
- Facilitate the development of creative supports as requested
- Facilitate network building and person centered planning
- Facilitate a Maps and or Paths process as requested
- Provide ongoing information on community events and resources that may be accessed by the family and individual
- Facilitate community relationships
- Assist and support the family in linking and communicating with outside resources as requested

Source:

Community Living Windsor
<http://www.clwindsor.org/>

b) About Agency Personal Support Agreements

Example #1:

Personal Support Agreement

for the period

April 1, 2008 to March 31, 2009

BETWEEN

(PERSON)

AND

(AGENCY)

This agreement involves the use of Ministry of Community and Social Services (MCSS) funding, which is subject to strict terms and conditions, to support the implementation of a personal plan for supports. It is the intention of the parties that these terms and conditions are met in a mutually supportive manner. It is also the intention of the parties that these funds are to be used in a most responsible and efficient manner so as to enable the person supported to experience a positive and rich quality of life.

The allocated funds for implementing this agreement are based on an annualized amount of \$. This amount may be adjusted and increased by further negotiation and planning as approved by MCSS. It is agreed that funds will only be disbursed according to the Cost Summary (Appendix A).

A. I _____ WITH THE SUPPORT OF MY FAMILY, AGREE THAT:

1. My family will assist me directly by ensuring my well-being. They will also ensure that I have opportunities for a positive role in planning, decision-making and efforts towards continuous quality improvements.
2. We will be responsible for the health, safety and security of my life and with the support of (AGENCY), to ensure that my support arrangements meet the Ministry's requirements.
3. We will show these papers to all staff that I choose to work with me.

4. These funds have been allocated for the purchase of individualized supports that I need to live as an adult citizen in my community. Funds may be used for capital costs or personal expenses only if approved by MCSS in writing.
5. We will provide advice and any information needed to assist and enable (AGENCY) to fulfill its requirements under this agreement in order for (AGENCY) to meet its statutory responsibilities and to maintain our mutual compliance with all relevant federal/provincial acts, regulations, as well as the policies, obligations and directives that must be met as established by MCSS.
6. (AGENCY) will not be responsible for any costs in excess of the approved level of funding provided to (AGENCY) by the MCSS.
7. We will be fully responsible for the Self Employed Contractors hourly rate and will be responsible for making all personal remittances and payments as required. (AGENCY) has no responsibility whatsoever for the administration of Self Employed Contractors hourly rates, benefits, related costs and any other statutory related obligations. Additionally, (AGENCY) will not be responsible for any worker related injuries.
8. We will ensure that every Self Employed Contractors meets the basic qualifications as set out by (AGENCY) with respect to skills, training, orientation, knowledge and adheres to the *"Self –Employed Contractor/Parent Agreement"*.
9. We will maintain accurate records in regards to Self-Employed Contractors Information and hour rates. This information will be provided to (AGENCY) or an official of MCSS.
10. (AGENCY) is not expected to take responsibility for negotiating or justifying the appropriate level of funding to meet my needs or the requirements described in my personal plan.
11. We will review information provided by (AGENCY) concerning financial transactions on my behalf and the amount of available funding remaining to implement my support plan within the funding/budget period. We will take appropriate action as necessary or recommended, ensuring that we do not commit funding beyond our fiscal and/or annualized allocation.
12. We will have primary responsibility for advocating for my needs, including all activities concerning the budgetary process with the Ministry.
13. We will review my Personal Support Agreement once a year with (AGENCY).
14. My family will provide direct support to me so as to be directly involved in the operations of my supports and to help keep the cost within the allocated funds provided.

B. (AGENCY) WILL:

1. Agree to support me with my personal goals. Allow/enable empower me (and all my direct caregivers, friends, and any other direct service providers) to provide and coordinate the supports I need to live in my house, enjoy my life and be active in my community and to do my best.
2. Act as a funding bank/Transfer Payment Agency to receive any allocated support dollars provided by the Ministry of Community and Social Services and account to the Ministry on all expenditures up to the maximum amount approved.
3. Pay invoices for only authorized expenses as approved in the Cost Summary for my support. Invoices for expenses other than for the support workers must include receipts for audit purposes.
4. Maintain and monitor financial records for all expenditures to account to the Ministry for proper and authorized use of funds expended by my family and me.
5. Monitor cash flow in relation to the operating budget and provide me and my family with monthly variance reports.
6. Assist, when requested, with the operating budgets to ensure allocated funds remain available for year-long implementation of support plan.
7. To provide support to ensure life experiences are as positive, rich and diverse as possible.
8. As the Transfer Payment Agency, we will meet the MCSS requirements for monitoring and accountability for individuals in receipt of individualized support funding. See Quality Assurance, Accountability and Monitoring Agreement attached.

C. OUTCOMES – SEE ATTACHED

1. Together you, my supports and I will review my outcomes every six months or more often if I request it.

Outcomes to be added

D. SELF-DETERMINATION

I have a right to make decisions, which affect my life. The Service Provider and paid people will support my right to make decisions that will affect how my life unfolds. My decision-making rights include but are not limited to: employment, education, personal goals, friends the use of community amenities, leisure pursuits, the type of service being provided by the service provider and the manner, in which the service is being provided.

E. SUPPORTS TO SELF-DETERMINATION

1. My support networks are my family and friends that I trust. They are the people in my life who provide friendship, counsel and support in the decision-making process and assistance in monitoring service quality. They are involved in various aspects of my life and help me to meet new people in the community.
2. My key contact is the person in my support network who can be called to talk about me. My Key Contact is _____ who will sign along with me so I have support to understand the nature and purpose of the document. I will let my key contact know through my words or actions whether I like what is happening in my life.

F. CONFIDENTIALITY

Any information about me will be kept private.

Everyone involved with this agreement will ensure that any information about me will be kept private. Any release of information needs written permission and is witnessed by my Key Contact.

G. INDIVIDUALIZED APPROACH TO FUNDING

An individualized approach to funding is a tool to ensure an individualized service. It is understood by all parties that the allocated dollars are to be used in supporting me to fulfill the outcomes of my plan.

H. PORTABILITY AND FLEXIBILITY

I can buy my support services wherever I want.

Portability means that if this agreement is terminated because of dissatisfaction or for any other reason, the allocated funds may be applied toward a new

agreement with another service provider as approved by me, MCSS and my Key Contact(s). Recognizing that the need for support may fluctuate during this agreement, it is understood that the allocated funding will be flexible to enable necessary adjustment.

I. MONITORING AND ACCOUNTABILITY

I, along with my family and friends, will be watching to make sure that I'm getting what I asked for as described in my personal plan.

Staff providing my support answer to me and my family.

Staff support me in decision-making giving consideration to personal safety and finances which increases my inclusion in the community i.e. choices that are within the law, within acceptable norms and values the environment and situation.

We will work along with (AGENCY) in its' monitoring and accountability role to ensure that I am supported in a way that I am able to live my life the way I need and want to. Together we will undertake to monitor the quality of my supports by taking part in scheduled reviews of the supports and services being provided.

1. Changes to this agreement must be in writing and signed by all parties.
2. Anything written about me is mine and I can ask my Key Contact to help me read it when I want. (AGENCY) will keep, and make available to me upon request, information and particulars about their responsibilities and financial information. All documentation will be respectful of me and focus on capacities.
3. (AGENCY) with its legal and financial responsibilities for this agreement will keep proper records related to this agreement for audit purposes.
4. To ensure that the functions of quality measures (outcomes and successes), accountability and monitoring are in place, family, my friends and I will partner with (AGENCY) to review and ensure that proper records are maintained. See attached Quality Assurance, Accountability and Monitoring agreement.

J. DISPUTE RESOLUTION

If we disagree about something, we will talk with each other about it.

If any party to this agreement disagrees about something, the issue will be talked about in a timely and effective manner including me, my family, my network and service provider. Every effort will be made to resolve issues and disagreements

on an informal basis as they arise. If an issue cannot be resolved in this manner, mediating support will be sought in a form that we agree.

K. MY RIGHTS

I will make my own informed choices (with the support of my family and the people I trust) and those choices will be respected.

I expect to receive the support necessary to make self-determined, informed choices on a daily basis and to have those choices respected.

I have the same rights as everyone else.

I have the same human rights as everyone else under the Canadian Charter of Rights and Freedoms and the Ontario Human Rights Code.

I will tell you honestly how I feel about the support you are giving me.

You have responsibility to immediately report any breach of my fundamental human rights by any person to the appropriate agency personnel and to the family members.

L. REVIEW OF AGREEMENT

We will review these papers and my budget every six months or sooner if I want to.

We agree to review this document and the budget within six months or at the request of the individual/family and to look at outcomes, successes and financial information in relation to meeting my needs according to the terms of my personal plan and lifestyle choice. Any mutually agreed upon revisions will be made at this time.

M. TERMINATION OF AGREEMENT

If you or I, with the assistance of my key contact, want to end this agreement, we can give 15 days notice, or some other term of notice in writing if we agree.

These papers have been explained to me as well as my Key Contact(s) and we agree with everything said in these papers.

Signed by:

Person Date

Key Contact(s) Date

(AGENCY) Representative Date

Source:
Community Living Windsor
<http://www.clwindsor.org/>

Example #2:

Personal Support Agreement Sample

Between
(PERSON'S NAME)
And
(AGENCY NAME)

Effective: Between (Date) and (Date)

Hours of Support:

No. # of hours/ dollars allocated per week:

(For example, John receives 10 hours of support weekly from (AGENCY), 10 hours of support weekly from a companion and 5 hours per week from Special Services at Home. John receives a total of 25 hours of support weekly.)

Break down: (provided by AGENCY)

Employment – 1hr. weekly

Community Options – Support hours weekly

Supported Independent Living – Support hours weekly

Individualized Support – Support hours weekly

Service Coordination:

Planning:

Indirect Support: 5 hrs. monthly

Support Worker:

Service Coordinator:

Planning:

Planning gives you the opportunity to bring together your support network, express your desires, and explore new possibilities. AGENCY provides planning services based on the principles of Person Centered Planning. Planning is useful in determining how existing supports and services will be customized to your wants, needs and situation. Limited resources need to be utilized effectively. A good plan leads to good services and supports. In addition to Person Centered Planning, (AGENCY) uses many other tools to gather information about the goals that are important to you. Some of these include Personal Outcome Measure interviews, Social Capital Quiz, Right's Audit, and My Life Portfolio as well as other internal audits. John, we had the opportunity to complete a Person Directed Planning session and a Rights audit with you. From these tools and conversations with you we have determined the following as your priorities.

GOALS:

1. *To have consistency of supports (people experience continuity and security).*
2. *To keep busy and happy (people participate in the life of the community).*
3. *To continue to be a committee member and to volunteer in your community (people perform social roles).*
4. *To continue to have the best possible health (people have the best possible health).*
5. *To continue to have assistance to maintain your home and help with banking, shopping, cleaning and meal preparation (people choose where and with whom they live).*

A Support Agreement is an understanding and acceptance of the services you will receive in the coming year from (AGENCY). It outlines the ongoing support you require to remain active and independent in your home and community. It will be in effect from January 2008 – January 2009. A review will be completed at that time; however; a review and changes to this document can be made at any time during this year if the parties involved deem it necessary.

Goals:

1. **To have consistency of supports** (people experience continuity and security). You would like to know that you can rely on your support workers and companions. It is important for you to direct your supports and to know that they will be provided in a consistent and predictable manner. You have asked that you're (AGENCY) worker and your companions write the times that they will be supporting you on your calendar so that you can refer to it. You have also developed some protocols that provide information to all staff supporting you how to best assist you if you have any difficulty. Following these protocols and having clear limits and boundaries that are used consistently by everyone help you to feel safe and secure.
2. **To keep busy and happy** (people participate in the life of the community). You enjoy being active in your community and have requested support to ensure that you can access activities and events of interest to you. You have indicated that you would like a majority of your companion support time be used to allow you to access the community and participate in events. You have asked that your (AGENCY) worker assist you in keeping abreast of events and opportunities that are available in the community. You have also requested assistance with budgeting to allow you to experience as many events as you are financially able. Finding activities that are free is also very important to you.
3. **To continue to be a committee member and to volunteer in your community** (people perform social roles). You have stated that you enjoy being a member of the social capital committee. You have also stated that you would be interested in attending the self advocacy committee. You enjoy being a participating

member of your community and would like assistance to work at developing your social roles. You have indicated that you would like both your (AGENCY) worker and your companions to keep you informed of short term volunteer opportunities that may be of interest to you. You continue to access many of these with both companion and (AGENCY) support.

4. **To continue to have the best possible health** (people have the best possible health). Feeling good is important to you. There are some aspects of maintaining your health that you find stressful (such as blood tests, dentist and doctor visits). You would like assistance from (AGENCY) to ensure that your basic assurances are being met and that you have the emotional support you need when faced with stressful situations involving your health. You have indicated that you prefer to have your (AGENCY) worker or you mother assist you to appointments and help you if you experience difficulty.
5. **To continue to have assistance to maintain your home and help with banking, shopping, cleaning and meal preparation** (people choose where and with whom they live). You are a proud homeowner and enjoy living independently. You would like Community Livings assistance to help you maintain your current living situation. Your (AGENCY) worker has developed schedule of chore supports for you and both you (AGENCY) worker and your companions support you to maintain your home. You have indicated that you would prefer your (AGENCY) workers assistance with banking and grocery shopping.

Outcomes:

(AGENCY) staff will assist you to achieve your expected outcomes, with your assistance. This agreement does not constitute a guarantee that you will achieve your expected outcomes; however we will work cooperatively with other agencies/service providers and your support network to provide the best supports possible. The provision of supports and services are contingent upon the availability of funding from the Ministry of Community and Social Services.

(AGENCY) Worker Assignments:

(AGENCY) will assign a Support Worker to you for up to 10 hours each week. Your hours of support will typically be as follows: Mondays from 5:30pm – 8:00pm, Tuesdays from 2:00pm – 5:00pm, and Wednesdays from 4:00pm – 5:00pm and Fridays from 9:00am – 12:30pm.

In the event that the support worker is unable to support you at the scheduled time (AGENCY) will make alternate arrangements provided staffing is available. We will try to offer consistent support; however, our primary objective is to assist you to develop supportive relationships and continuity through active participation in the community. The growing number of people in our community with unmet needs; staff vacations, sick leaves, promotions, resignations or reassignments, all impact on the staff assigned to

you.

Continuity and Security are most attainable in your community and with people you feel are most important to you. If other supports are arranged, you will have the opportunity to meet and orientate new workers to your support routine. You may choose to cancel supports. (AGENCY) reserves the right to recruit, select, hire and transfer its employees as it deems necessary.

Advocacy: (how we will help others to respect you and your needs)

(AGENCY) will assist you by supporting you to advocate for yourself or by advocating for: the services and supports that you require; your right to inclusive community participation; your right to develop and maintain whatever relationships you find meaningful; your right to medical and professional support; and your rights as a Canadian citizen. Advocacy will only occur with your knowledge and consent. Through the encouragement of community connections it is hoped that positive relationships will develop.

Accountability: (what you can expect from (AGENCY))

You can expect:

- To direct your own services.
- (AGENCY) to respect your right to privacy. Any information concerning you, your family or your situation will not be disclosed without your expressed written consent. A file is held at the Association office that contains information specific to you and the supports and services you receive.
- To be able to review your file at (AGENCY) when you request it
- That this agreement be reviewed at least annually.
- To receive a written update of the supports and services that you receive every three months. A copy of which will be kept at the (AGENCY) office.
- To be heard and responded to in an efficient manner.
- (AGENCY) to use Personal Outcome Measures as a tool to measure satisfaction with your supports and of our complaint policy.
- (AGENCY) will maintain current information about your health, medical appointments and will complete financial, safety and standards for living audits with you
- (AGENCY) will regularly review with you information about your health and medication to ensure you have the information you need to be making informed choices.
- That if you have a concern or complaint about (AGENCY) processes or employees, that it will be acknowledged and addressed in an efficient manner.
- A lot of questions and discussion about your outcomes and priorities and the processes that are or need to be in place to achieve them.
- To have access to information on (AGENCY) as an organization (i.e. annual reports, newsletter, brochures).

- Should you have any concerns with regards to the support that you receive, you are encouraged to contact your Service Coordinator directly. There is a customer complaint process that is available for formal complaints with the organization that your (AGENCY) worker will review with you.
- You can expect to be respected.

(AGENCY) expects from you:

(This clause does not apply to all people – use your own judgment when adding this)

- That you will give us notice if you intend to cancel your support time
- That staff will be treated with respect
- That you will strive to maintain your own health and personal hygiene, as not to place yourself or others at risk
- That you will direct support time to be used to enhance opportunities, connections in the community and to maintain your health and home

Service Coordination:

The Service Coordinator will provide supervision and monitor staff activities, and act as a resource to the Support Worker. The Service Coordinator is responsible for maintaining the Support Agreement and promoting supports that are in keeping with the organizations Goal and Vision Statement and your desired outcomes as well as review regular updates from your Support Worker.

You're Rights as a Citizen:

Your (AGENCY) Worker will respect you and assist you to understand and exercise your rights; as well as, educate your community about the rights that you have as a citizen. Your (AGENCY) worker will review information about rights and responsibilities with you.

A Rights Audit will be completed with you on a yearly basis if you choose to participate. The findings will identify what rights are important to you, any rights you are having difficulty exercising or understanding and will identify any right restrictions that may be present in your life.

Through this audit and other support practices we have identified that the following are rights are important to you (the right to life, the right to freedom, the right to have things explained to you and the right to be heard). Your (AGENCY) worker will review these with you and will assist you to utilize any additional support or resources you may need to protect and promote your rights.

You will also be invited to participate in rights training through Community Living. We encourage you to take part in these training sessions in order to learn more about your rights.

These are a plain language version of your rights from People First Ontario
<http://www.peoplefirstontario.com/>

- *The Right to Life*
- *The Right to Freedom*
- *The Right to Control what happens to your Body*
- *The Right to Equal Protection and Equal Benefit of the Law*
- *The Right of Choice*
- *The Right to Vote*
- *The Right to Informed Consent (to know all your choices)*
- *The Right to Have Things Explained to You*
- *The Right to be Heard*
- *The Right to See a Lawyer or other Advisor*
- *The Right to Have Enough Money to buy food, have a place to live and decent clothes*
- *The Right to Proper Medical Care*
- *The Right to Charge Someone if they hurt you or take something of yours*
- *The Right to be Educated*
- *The Right to Apply for a Job and be taken seriously*
- *The Right to Safe Working and Living Conditions*

Membership:

If you are interested in becoming a member of (AGENCY) you can find out how to go about this by asking your (AGENCY) Worker or your Service Coordinator. They can help you get started. (AGENCY) is YOUR organization! You can make a difference by becoming a member!

I have reviewed this Support Agreement with my support network and I agree with the goals/supports/services outlined in this document.

_____ Date _____

(AGENCY) Worker Date _____

Service Coordinator Date _____

Executive Director Date _____

Service Coordinator please initial when information has been added to the Data Base
_____ (Initial)

Source:
Community Living Upper Ottawa Valley
<http://www.communitylivingupperottawavalley.ca/>

c) About Financial Monitoring Agreements and Documents

Sample Agency Support Invoice

SUPPORT INVOICE For Reimbursement of Support Costs(s) as per Agreement

Payment To: _____

Name of Person Supported: _____

Support Information for Reimbursement:

Date Worked	Time Worked e.g. 5:00 pm - 10:00 pm	Total Number of Hours	Type of Support Provided & Where e.g. Personal Care at Home, Recreation @ YMCA	Self Employed Contractor(s) Name PLEASE PRINT	Self Employed Contractor Signature

Total: _____ Hours/Days

TOTAL:

\$

Rate of Pay: \$ _____ per hour/day

OTHER EXPENSES AS OUTLINED IN YOUR INDIVIDUALIZED FUNDING COST SUMMARY OFFICIAL/STORE RECEIPTS MUST BE ATTACHED

DESCRIPTION	COST

TOTAL TO PAY:

\$

**PARENT/GUARDIAN SIGNATURE
OR PERSON SUPPORTED:** _____

DATE: _____

Source:

Community Living Windsor
<http://www.clwindsor.org/>

d) About Agency Quality Assurance, Accountability, and Monitoring Agreements

SAMPLE QUALITY ASSURANCE, ACCOUNTABILITY AND MONITORING AGREEMENT

THIS AGREEMENT made as of the 1st day of April 2005.

BETWEEN:

(PERSON)

AND

(AGENCY)

WHEREAS:

- A. (Agency Name), as the transfer payment agency, must adhere to the Ministry of Community and Social Services (“MCSS”) requirements for monitoring and accountability for the funding and support on behalf of those individuals who have been allocated funding by the MCSS for which you have requested administered through (Agency). We will support the implementation of a personal plan of supports as set out in the individual’s Personal Support Agreement.
- B. The Individual has been allocated individualized support funding from “MCSS” to be disbursed in accordance with the provisions of the Cost Summary attached to this Agreement.

THE PARTIES AGREE AS FOLLOWS:

Term of Agreement

C. This Agreement is for the period commencing _____ and ending _____.

D. Person/Family Responsibilities:

1. I, along with my family will be responsible for contracting with all paid Self-Employed Contractors. It is understood that the Self Employed Contractors that support me are not employees of Agency.
2. I, along with my family, agree to ensure that all Self Employed Contractors have the appropriate skills, qualifications, orientation and training and to forward copies of the following documentation for each Self Employed Contractor to Agency:
 - criminal reference check;

- valid standard First Aid/CPR certificate;
- copy of reference checks;
- signed copy of “Self –Employed Contractor/Parent Agreement”
- drivers license; (only if driving during the course of employment)
- valid vehicle insurance
- resume

E. I, along with my family agree to ensure that all Self Employed Contractors meet Agency and MCSS standards.

F. I, along with my family agree to ensure that Self Employed Contractors receive orientation and training as specified by Agency.

1. I, along with my family agree to establish and implement policies and procedures for Self Employed Contractors as specified by Agency and required by MCSS.
2. I, along with my family agree to review the “Self-Employed Contractor/Parent Agreement” once a year and forward a signed copy to Agency for all Self Employed Contractors.
3. I, along with my family will self-administer and manage the necessary supports and perform the following duties:
 - a. Adhere to expenditures as approved by the Ministry of Community and Social Services as outlined in the Appendix A – Cost Summary;
 - b. Maintain all aspects of proper and accurate financial records with respect to expenditures of Ministry funds and provide AGENCY with records of same;
 - c. Provide Agency all detailed financial information by invoicing AGENCY with approved Self Employed Contractors hours and expenses.
 - d. Maintain appropriate and adequate home insurance for the purpose of Self Employed Contractor liability and forward such documentation to AGENCY;
 - e. Report all Serious Occurrences immediately as per Ministry of Community and Social Services and Community Living Windsor guidelines (Appendix D).
2. I, along with my family agree to establish, as necessary, policies and procedures that may be required to conform to MCSS regulations, policies and directives for those in receipt of individualized support funding.
3. I, along with my family agree to pay AGENCY 10% of the amount of approved funding for an administration fee for the provision of support, monitoring and accountability functions to meet MCSS requirements.

G. Agency's Responsibilities:

1. Provide administrative, supervisory and human resource management guidance and support as needed and/or requested.
2. Review Outcomes at minimum every six months or more frequently upon request.
3. Complete the Ministry's Individual Support Agreement (ISA).
4. Provide human resource support where required or requested to select, train and orient Self Employed Contractors.
5. Offer opportunities for training and orientation for Self Employed Contractors such as First Aid, CPR, (note: the direct cost of training materials would be an additional cost) and any other available training (note: direct costs of training would be an additional cost).
6. Forward serious occurrence information to the Ministry of Community and Social Services.
7. Assist with the establishment of policies and procedures as may be required to conform to MCSS regulations, policies, directives and all related requirements for those in receipt of individualized support funding.
8. Assist with the establishment, implementation, adherence and communication of policies, procedures and standards for Self-Employed Contractors.
9. To work together with my family to ensure that policies, practices, procedures and standards are maintained .
10. Monitor on a regular basis my support arrangement to ensure health, safety and security in all aspects of my life.

This Agreement signed by the parties on this date has been explained to the parties in a way that they understand. By signing the Agreement, the parties confirm that they understand the contents of the Agreement and the responsibilities of each party set out in the Agreement.

INDIVIDUAL AND/OR KEY CONTACT DATE

AGENCY NAME
PER: _____ **DATE** _____

Source:
Community Living Windsor
<http://www.clwindsor.org/>

Sample Cost Summary

Date of Agreement: April 1, 2008 - March 31, 2009

Annual Support Funding:

Name:

D.O.B.:

Address:

Phone Number:

Key Contact:

Address:

Phone Number:

Expense Item	Description
<i>Staff Support</i>	

Total Staff Support Costs

0.00

Purchase Service/Supports

Staff Mileage/Gas

Staff Training

Staff Expenses

Transportation

Other

Administration Costs

Total Expenses

0.00

Source:

Community Living Windsor

<http://www.clwindsor.org/>

4. Documents to Assist Families with Coordinating and Managing Support People

a) Independent contractor Roles, Functions, and Principles

Sample Principles to Guide Support

Principles to Guide Support of Sally Sample

Principles such as these can be developed over time by the person, their Support Circle, and become very helpful in the process of hiring and training of support people, orienting them to the support approach, and refreshing the approach if there are situations where the support worker or family are not clear on how to respond or support the person. The principles become 'true north' for supporters. Of course they can be added to over time by the person, and those who support them.

- We are a family who are dedicated to helping our daughter Sally to achieve a safe, meaningful and active life in her own home and in her community
- We strive to support Sally to take up roles in the community that are valued by her. We have the assistance of Sally's 'Circle' to support this. These friends and family also provide concrete practical supports in decision making and help locate resources.
- We are committed to supporting Sally to identify, communicate and carry out her goals and desires, and to guide her to make good decisions.
- We support Sally in identifying her support needs and directing her support and personal care as much as possible by ensuring that she has the time she needs to respond to questions and communicate her choices.
- We are committed to assisting Sally to present a positive image at all times.
- We support Sally as a homeowner to manage and care for her home and belongings.
- We recognize how important it is to honour the shared space and possessions of Sally's roommates (where there are individuals sharing the home, or where there are supportive housemates in part of the home).
- We are committed to ongoing learning and collaboration with all who care for and about Sally.
- We intentionally support Sally to strengthen her relationships and friendships in the community.
- We strive to work through misunderstandings and conflicts with each other in order to encourage good communication.

- As a Support Worker you will contribute to the overall vision by assisting Sally to take up her community roles, manage the tasks of being a householder listening at all times to her choices and preferences, and encouraging her to communicate them.

Source:

Based on documents developed by a family and an independent facilitator (from *Families for a Secure Future*) to support an individualized residential arrangement.

<http://www.familiesforasecurefuture.com/>

Sample Support Worker Job Description

Key Elements to Include

Overall role of the Support Worker:

Include a list here of the overall role the support worker will play in the life of the individual being supported. For example, it might be important to include a short synopsis of the capabilities of the Person and how much overall support they require in carrying out daily tasks, such as personal care. You may want to include a statement about what you hope the support worker could contribute to the learning and growth of the individual.

Specific Aspects of the job:

You will need to outline the specific tasks involved in the job – at a detailed level. Following are the general areas to consider. Think about what tasks are required within each of these areas, and other areas (not listed here) that are important to the support of the individual. List all of the tasks required within each area.

1. Personal Care, including dressing, getting ready for the day or for bed, etc.
2. Exercise, such as assisting the person with specific physical exercises that might be required
3. Health Care, including administration of any medication, brushing teeth, etc.
4. Monitoring and ensure healthy diet
5. Organizing social activities; helping individual to maintain friendships; helping with community involvement
6. Cleaning, laundry and home care – specify whether these activities would be carried out with the person or on own
7. Addressing safety concerns
8. Helping with Self Advocacy – assisting in finding opportunities for individual to take up role as advocate in community; advocating for individual when he/she is vulnerable
9. Assisting with transportation to and from activities (specify whether driving would be involved or via public transportation)

Hours Required:

Include the number of hours per day, number of days (which days) in the week, and specific hours during the day (e.g., evening hours, early morning, etc.).

Source:

Based on documents developed by a family and an independent facilitator (from *Families for a Secure Future*) to support an individualized residential arrangement.

<http://www.familiesforasecurefuture.com/>

Sample Role of a (Paid) Companion

A companion is a person that has been hired privately by “Sam Sample” to work within a team environment with service providers and family to support Sam to live successfully in his home and community.

Some of the functions of a companion include but are not limited to the following:

Sam needs a companion that,

- Provides him with the opportunity to participate in meaningful activities at home and in the community.
- Supports him to live in a safe environment free from undue harm.
- Follows established protocols and routines (personal care, medical, household, menu, behavioural).
- Participates in training that is applicable to Sam’s support.
- Maintains a positive home environment for Sam to live.
- Treats Sam, his family and other members of his support network with kindness and respect.
- Prepares nutritional meals in keeping with his dietary needs.
- Adheres to doctor’s orders with regards to Sam’s personal health care needs.
- Contributes to his happiness and well-being.
- Keeps other members of Sam’s support network informed by accurately recording daily events in his journal.
- If absent for any reason, secures support within the Support Network companions.
- Is confidential about Sam, his family and support network.
- Honours the terms of the contract with Sam and his mother, Mrs. Sample.

Source:

Community Living Upper Ottawa Valley
<http://www.communitylivingupperottawavalley.ca/>

b) Independent (Paid) Contractors Agreements

Information Package about Independent Contractors

It is extremely important that the person purchasing service and the independent contractor both understand at the beginning of the relationship that the independent contractor is not an employee. This should be stated clearly in a contract between the purchaser and the independent contractor.

Some reasons why people have chosen to be Independent Contractors...

- Some independent contractors have reported a high level of satisfaction with not having the 'red tape' that they associate with working for an agency.
- In the situation where the independent contractor is a supportive roommate, there is a reported satisfaction with being able to provide service within the development of an informal relationship with the individual purchasing the service (e.g., providing support while they are both in their pyjamas).
- Bona fide independent contractors usually have more flexible work hours and are often permitted to work out of their home. This may permit a deduction for travel costs from the home. As an employee, the trip from the home to the place of employment is generally not deductible. The "Employment Expenses Tax Guide" helps calculate the amount allowed.
- Independent contractors avoid employment insurance requirements, income tax and C.P.P. deductions at the source.
- Self employed people operate a business. This means there are many deductions an independent contractor is entitled to that an employee is not. There are fewer restrictions on deductions. Any expense incurred to earn business income is generally deductible as long as it is not of a capital nature. Even, at that, capital cost allowance is often permitted. To be deductible for tax purposes, the Income Tax Act requires that the expenses be incurred for the purposes of producing income. Therefore, any expenses incurred as a direct result of the contract business or because of the contract business, should be deductible from the income earned from the business. Some of the more common expenses that can be claimed by a contract worker include; groceries, home supplies (first aid supplies, cleaning supplies, dishes, towels, sheets), accounting and legal expenses, bank charges, advertising, automobile expenses, wages, telephone, travelling expenses, training costs, repairs to home or furnishings. In addition to the direct expenses, certain household expenses may be partially allocated to the business. These would include heat, hydro, water, cable TV, mortgage interest, property tax, and maintenance and repairs.

Some reasons person purchasing services choose Independent Contractors...

- In the supportive roommate situation, there is a desire to 'share life' with someone rather than 'have staff sleep over every night'.
- Support can at times be provided in more informal ways. For example, in the supportive roommate situation, support with meal preparation is done in a way that recognizes both people live there and must eat. Some person purchasing services report this 'nicer' than having someone come into their home to specifically help them with meals and other chores.
- There is a clear and direct accountability to the person purchasing service.
- There is reduced government reporting on source deductions.
- There is reduced employer-provided benefits such as employment insurance, Canada Pension Plan, Workers' Compensation, provincial health taxes.
- The person purchasing service avoids employment obligations such as vacation pay, termination pay, pay equity and employment equity requirements under Provincial Labour Standards Acts.

What it means to be an Independent Contractor...

Being an independent contractor is clearly different than being an employee of an agency. It is important to understand these differences. There are both advantages and disadvantages which must be carefully considered by both the person purchasing service and the independent contractor. Some of these differences include:

- Independent contractors are accountable only to the person purchasing their service (and their support circle if they have chosen this help). There is no accountability to another service provider. Often the person purchasing the service does use Community Living St. Marys and Area to pay the invoices of independent contractors, once they are approved by the person.
- Independent contractors set their own hours based on mutual agreement.
- Independent contractors set their own fees. These may be negotiated with the person purchasing their services.
- Independent contractors are not governed by policies and procedures of an agency. They are responsible to offer quality service and have no supervisor doing regular performance appraisals.
- Although the person purchasing the service will monitor the quality of service they are receiving, they may choose to have help with this monitoring function. This may include asking Community Living St. Marys and Area for to help them monitor the service of the independent contractor.
- Because they are not accountable to an agency, independent contractors are truly independent. This means they also receive no support, guidance or direction from any agency. All support must come from the person purchasing the service.

In the event of an emergency, independent contractors are expected to use their own creativity in problem solving and receive any support needed from the person purchasing service/support circle.

- Independent contractors have the right to subcontract part of their work. Most times, the purchaser will retain the right to approve subcontractors before the work is done.
- Independent contractors are generally expected to identify their own training needs for professional development etc. These costs are usually covered by the independent contractor; for income tax purposes these may be a deductible expense.
- Independent contractors are self-employed.
- All self-employment income must be declared for income tax purposes. The independent contractor usually completes a “Self-Employment Report”. To help calculate this, the “Business and Professional Income Tax Guide” is available from the taxation office.
- As required in any business, the independent contractor must maintain proper records for tax purposes. The tax return requires that an income statement as well as a balance sheet be filed with the return to support the business income that is being reported. Depending on the size of the business, it may be possible to avoid filling out a balance sheet, but an income statement will always be required. Failure to keep proper records may subject the taxpayer to a fine. In order to avoid this, at minimum a cash receipts book and a cash disbursements book should be maintained. From these two reports an income statement can be prepared.
- The independent contractor may have to make a Canada Pension Plan (CPP) contribution on self-employed earnings. However, the actual amount is based on the amount of self-employment earnings. The rate of contribution is available from the taxation office. If there have been wages from another employer where CPP deductions were made, the amount required on self-employment earnings will depend on how much has already been contributed for the year.
- Because independent contractors are self-employed, they cannot claim Employment Insurance Benefits at the end of their contract.
- The fees of independent contractors are usually all inclusive - there is no additional reimbursement for mileage, etc.
- Preparing Business Income Tax Returns: Use a T1 General Income Tax Return Form. Earnings from contract work are reported in the Business Income Section of the income tax return. Contract workers do not attach all of their business receipts and invoices to their income tax return, but must save everything for six years.
- Useful information and forms available from the taxation office include:
 - “Automobile Expenses Claimed by Self-Employed Individuals” - Interpretation Bulletin IT-180

- “Expenses of Training” - Interpretation Bulletin IT-357R
- “Business and Professional Income Tax Guide” (which includes the T2132 Form for Claiming Capital Cost Allowance)
- Independent contractors are responsible for their own Workers’ Compensation coverage as well as any liability insurance (neither are mandatory, but the independent contractor has no recourse or financial support if it is needed and they have not arranged coverage). The cost of the coverage is \$2.20 per \$100 billed if the work is less than 24 hours per week. Overnight support is not considered within the 24 hours per week. The independent contractor pays the assessment, but the person purchasing service could restructure the compensation scheme to pay for Workplace Compensation Board premiums within the fee to the independent contractor if that is mutually agreeable.

Some things to be aware of...

The following information is a compilation from various sources. It is not intended to be considered complete.

It is the independent contractor’s responsibility to ensure full investigation of the responsibilities of being an independent contractor.

Revenue Canada

“Revenue Canada is concerned with the growing trend towards independent contractors. The 1996 Federal Budget proposed to devote more resources to the audit program on unincorporated businesses and self-employed individuals. Therefore, it is essential that the legal status of an independent contractor, versus an employee, is met through bona fide contracts, work arrangements and asset ownership.”

“Tax Tips and Traps”

“There is no single test that is decisive in determining whether an individual is an employee or an independent contractor. Three tests have evolved in the courts. Each of the tests determines the nature of the relationship rather than the nature of the services.”

Federal Income Taxation in Canada

The issue of whether someone is an employee or independent contractor depends upon the facts and circumstances of each case. There are no hard and fast rules as to when someone is to be considered an employee and when someone is considered to be an independent contractor. Generally the courts have relied on the common law distinctions between a contract of services (employee) and a contract for service (independent contractor). The critical factors which are looked at are:

- How much control does the hirer exert over the contractor providing the services?
- Does the contractor have an opportunity to make a profit or risk of taking a loss?
- Does the contractor own the ‘tools’ required to provide the services under the contract or are these things supplied to the contractor by the hirer?
- Is the contractor’s business independent of the hirer (in other words, is the

relationship with the hirer so critical to and integrated with the contractor's business that the business would not exist without the hirer)?

Some questions to ask yourself as a person purchasing service...

- Do I have the skills and help needed to give the independent contractor the support she or he may need? My support circle may need to become directly involved too. This might take time and energy for me and my support circle.
- Am I prepared to introduce the independent contractor to other service providers in my life? This may mean regular contact with my support circle and all service providers in my life.
- Am I able to work around the hours scheduled by the independent contractor? This may mean working with another service provider to arrange support.
- How do I want to monitor the quality of service from the independent contractor?
- Do I want to get a criminal reference check from the independent contractor before entering into an agreement? Am I willing to check references? Should they have First Aid/CPR?
- Should I get home insurance or tenant insurance with basic liability coverage? (This is encouraged to ensure that if an accident happens while anyone, including the independent contractor, is in your home, you are covered. Check with your insurance agent for any additional information.)

Some questions to ask yourself as an Independent Contractor...

- Am I prepared to work independently? Am I able to articulate what I need and want from the individual purchasing my service? Am I able to problem solve on my own? Am I prepared to use my communication skills to be in regular contact with other service providers in the person purchasing service's life?
- Do I understand the full financial implications of being an independent contractor? Do I understand the implications if it is ever determined that I am not a bona fide independent contractor by e.g.; Revenue Canada's standards?
- Am I planning to subcontract? The person purchasing service may want approval of the worker. Do I understand I am considered liable for their work? I may be responsible for ensuring any subcontractors have obtained criminal reference checks before performing any work depending on the wishes of the person purchasing service.
- Have I checked with the Workers Compensation Board and Revenue Canada to fully understand my responsibilities as an independent contractor?
- I may need support to talk about my experiences, excitements, frustrations. Besides the person purchasing service and support circle, where will I go to get this support?

Source:

Community Living St. Marys and Area

<http://www.communitylivingstmarys.com/>

Sample Self-Employed Contractor/Parent Agreement

Between

(Referred to as the Parent/Guardian)

And

(Referred to as the Contractor)

1. Term of Agreement:

2. Type of Service Being Purchased:

The purpose of this Agreement is to confirm the agreed upon responsibilities in the provision of support services to_____.

3. Employment Status:

It is understood that:

- a. the Contractor is an independent self-employed worker;
- b. as with all self-employed arrangements, deductions will not be made from the Contractor's payment and remittance will not be made to the government on their behalf;
- c. the Contractor will maintain full responsibility for keeping a record of payments made by the Parent/Guardian and for declaring their income to Revenue Canada for income tax purposes;
- d. a T-4 slip will not be issued;
- e. the Contractor is responsible for work-related injury insurance if required;
- f. the Parent/Guardian agrees to provide the Contractor with all of the information needed to ensure the safety and well-being of the person being supported;
- g. the Contractor is responsible to ensure appropriate health and safety conditions are maintained for themselves and the person being supported.

4. Reimbursement:

- a. the Parent/Guardian will purchase support services from the Contractor at the rate of \$_____ per hour;
- b. the Contractor will use an invoice provided by the Parent/Guardian to record dates and hours of work. This invoice must be completed in full, signed, dated and submitted for review, approval and authorization. The invoice will include the following information:
 - full name and signature;
 - billing dates, number of hours and total hours;
 - approved expenses (and receipts) as identified and approved in the Cost Summary
- c. Should the Contractor be required to drive their vehicle as a condition of employment, payment for mileage is agreed at _____ per kilometre.

5. Recognition of Rights:

The Contractor understands that their role includes:

- a. the commitment to ensuring that _____'s human rights will be protected as those of any citizen under the Canadian Charter of Rights and Freedoms and the Ontario Human Rights Code;
- b. upholding the responsibility to provide a safe, nurturing and respectful environment at all times;
- c. protecting _____ from harm or abuse in any way whatsoever. Harm or abuse refers to any situation whether it is physical, verbal, emotional, sexual, or financial in nature
- d. demeans, hurts or infringes on personal rights or dignity or places _____ at risk to personal health and safety.
- e. the legal, moral and professional responsibility and commitment to immediately report any knowledge or suspicion of harm or abuse.
- f. the acknowledgment that the use of physical restraint is strictly forbidden other than for the prevention of harm to an individual or others and any use of a physical restraint requires a serious occurrence report.

6. Confidentiality:

The contractor agrees that all private information will be kept confidential. Any release of written _____ information or disclosure of personal information requires permission from the Parent/Guardian.

7. Meeting Ministry of Community and Social Services Requirements:

The Contractor agrees to:

- a. participate in regular reviews and provide pertinent information to the Parent/Guardian for accountability of supports and quality assurance;
- b. maintain a valid Standard Level First Aid/CPR certification;
- c. provide a criminal reference check, a resume, and SIN (for employee confirmation purposes only);
- d. immediately report any serious occurrence to the Parent/Guardian;
- e. should the Contractor be required to drive their vehicle as a terms of employment, the Contractor agrees to provide documentation of a valid driver's license and appropriate vehicle insurance (Third Party Liability) when using own vehicle.

8. Review of Agreement:

The Parent/Guardian and the Contractor agree to review this agreement in one year, as well as any time that it is felt needed. Any mutual agreed upon revisions will be made in writing at this time.

9. Termination Of Agreement:

Both parties have the right to terminate this Agreement with two weeks' notice in writing. The notice period can be varied with mutual agreement.

The Parent/Guardian has the right to terminate this agreement without notice and for any reason during the first three months of this contract, where in the sole opinion of the Parent/Guardian, the Self-Employed Contractor is deemed not suitable.

This agreement may be terminated without notice if there is any breach of the fundamental terms of this agreement, such as wilful misconduct, any harm, neglect or abuse of _____, breach of confidentiality, in event funding is reduced or cancelled, inability to honour the terms of this contract, or failure to provide services in accordance with this Agreement.

Signed by:

Parent/Guardian

Date

Self-Employed Contractor

Date

Source:
Community Living Windsor
<http://www.clwindsor.org/>

Sample Self-Employed Contractor Information Form

CONFIDENTIAL Self Employed Contractor Information

Provided to (Family who is purchasing your services): _____

Date: _____

Contractor Last Name: _____ First Name: _____ Middle Initial: _____

Street Address: _____

City: _____ Province: _____ Postal Code: _____

Telephone Number: _____

Social Insurance Number: _____

In case of Emergency, please notify: _____

Additional Information that can be kept on file for family and Agency reference:

- copy of driver license attached
- valid vehicle insurance
- completed reference checks
- criminal reference check
- self-employed contractor agreement
- valid CPR/First Aid certification
- protection from Harm Agreement
- resume

I acknowledge that the above information is true and that I am responsible to ensure any changes are forwarded for the purposes of updating this form. I understand that I am a Self Employed Contractor

I also acknowledge that this information is provided to (AGENCY) to fulfill their responsibilities and obligations to the Ministry of Community and Social Services as the Transfer Payment Agency receiving funds on behalf of the person supported.

Signature

Date

Source:
Community Living Windsor
<http://www.clwindsor.org/>

Sample Companion Services Agreement

Contract Agreement Between

**(Contractor Name)
And
Sally Sample**

For the Period: (date) to (date)

A Companion is a person that has been hired privately by “Sally Sample” to work within a team environment with service providers and family to support Ms. Sample to live successfully in her home and community.

In the capacity of companion I understand and agree to the following conditions of my contract with Ms. Sample:

- That Ms. Sample contracts me privately.
- That when a Companion, I am not affiliated financially or otherwise to another service provider or organization providing direct support to Ms. Sample.
- That I am directly accountable to Ms. Sample, her family and/or designate.
- That Ms. Sample has secured the services of (Agency) to assist him and her family to recruit, screen and supervise Companions based on an understanding of her support needs and acts in her best interest.
- That I work cooperatively with services providers to maintain a positive and safe living environment for Ms. Sample.
- That my responsibilities include but are not limited to the “roles of a Companion.”
- That I am respectful to Ms. Sample, her Support Network and property.
- Because Ms. Sample is a non smoker, there is no smoking permitted in her home.
- That I will not engage in activities that will place Ms. Sample in harm’s way or undue risk.
- That Ms. Sample is not responsible for loss or damage to my property unless he has deliberately caused said loss or damage.
- That Ms. Sample’s family and service providers are not responsible for loss of damage to my property.
- That I will receive remuneration from Mr. by way of a personal cheque payable to me on a bi-weekly basis.

- That my contract with Ms. Sample does not constitute a guarantee of shifts or hours.
- That it is my responsibility to declare my income on my tax return.
- That will endeavour not to place myself in a situation that is in conflict of interest.
- That I will adhere to established routines, protocols, planned activities and best support practices relating to Ms. Sample.
- That I maintain a valid driver's license and one million dollars liability insurance on my vehicle.
- That I will maintain current, First Aid, CPR.
- That I will participate in Non Violent Crisis Intervention training when available.
- That if I am unable to fulfill my contract for whatever reason will give Ms. Sample notification in writing of my intent to terminate our agreement.
- That failure to comply with the terms of this agreement may result in termination of my contract with Ms. Sample.
- That I understand that Ms. Sample ability to pay for companion services is dependent on the availability of resources provided by the Ministry of Community and Social Services to (Agency)

I have read, understood and agree to the terms of this contract.

Companion

Date

Sally Sample

Date

(Name) Parent

Date

Source:

Community Living Upper Ottawa Valley

<http://www.communitylivingupperottawavalley.ca/>

c) Roommate/Homesharer Agreements and Responsibilities

Elements of a Supportive Housemate Agreement

If your Individualized Residential situation includes a housemate (or in some cases, more than one housemate) who will live in the housing unit in their own space, and receive reduced rent because they are assisting with some monitoring, support functions, or back-up, it is useful to develop an agreement, again, just to be clear on the roles, the expenses, the payment, and how you would like them to support the person. This is an example of what such an agreement might look like, but of course, you will need to develop your own, with input from the person and the Support Circle, and in discussion with the Supportive Housemate (other terms we have seen used are Roommate, Housesharer, Resource person, and Monitor).

Parties To This Agreement: Name the family members, the person, and the housemate.

Nature of Our Relationship: Spell out the agreement about sharing the unit (house or apartment), where it is located, if there is anyone else involved, who owns the unit, and a very general statement of the nature of the supportive housemate's role (i.e. to provide support and back-up overnight in case there are care and safety needs to be addressed, while allowing the person to be as independent as possible). Also include the general statement that you will offer a reduced rent for the support described in this agreement.

Commencement: Identify the move in date, and when you will look at the situation and identify whether it is meeting everyone's needs.

Rent: Identify the amount of rent, to whom it is payable, and when each month.

Condo or other Expenses: Identify whether there are any additional expenses that the Housemate will need to pay related to the actual housing costs. Generally these are covered by the person/family, but there may be specific things, such as parking, that the person will need to cover.

Phone, Cable, Internet: Identify whether the person will be paying for land line phone charges and/or cable. Again, this would often be covered by the person/family, as it makes for easier administration. It would be expected that the Housemate would pay for all long distance charges and any additional communication services. You'll have to sort out internet, as it's usually a good thing to have for communication purposes.

Food, Storage and Meals: Describe the facilities in the kitchen and their availability for use by the Housemate. Identify any expectations about how purchasing, food preparation and storage will be managed, and whether there will be any sharing of preparation and dining between person and supportive housemate. In some cases, it may be determined that the occupants may make their own arrangements together regarding preparation and sharing of food costs, leaving it up to the residents to

determine details, but again, this is worth mentioning here.

Your support role: It is important to include here any general principles of support that have been developed by the person, family and/or support circle, so the housemate understand how they are to develop the support relationships.

Describe during which time periods the supportive housemate will be primarily responsible to be 'available', and what 'available' actually means in terms of actual tasks and support functions. This will be particularly important in situations where there are specific safety concerns, or need for personal attending around self care which is required, including such things as lifting, adjusting position in bed etc.

It will be important to note here what the housemate's responsibility is for managing any emergencies in the housing unit, and what procedures need to be followed. This may be a building emergency, or a health emergency related to the individual. You will likely also have a crisis plan in place for any personal issues which may arise which will need to be consulted and with which the housemate will need to be familiar and comfortable with their role.

Sharing Support Responsibilities: In a situation where there is sharing of responsibilities between housemates (if there is more than one), other supportive personnel, including paid and unpaid support persons, it needs to be clear what the arrangement will be if one of above is not available. Contingency plans will need to be in place, and there needs to be clarity about how this will be communicated. There will need to be a schedule which all agree to as well, as far as the actual times when the person is responsible, if it is not consistent hours, if the housemate goes away, or if the person does

Alternate Night Time Support and Ultimate Back-Up: In this section, it may be useful to identify who is available and how arrangements will be made in the event of unavoidable gaps in support. Identifying the first contact point for the housemate is important.

Safety: In this section, it is important to identify the needs and vulnerabilities of the person which the housemate needs to be familiar with, and also to identify any training, orientation, safety plans and safeguards for both the person and the housemate which have been put in place, or discussed. It is useful to define what is expected and meant by 'supporting safely', and to ensure that the housemate has the message that their safety is also a concern to the family and the person. Any health and safety management strategies should be outlined here. It may also be important to note that if the housemate is providing reasonable and safe care, they will not be considered liable should the person sustain injury while the housemate is supporting them. Also, it needs to be mentioned here that the housemate will release the person and family from liability for any injury that they sustain while supporting her. It is also useful to include the expectation that the housemate will alert the person and family to any safety concerns in the housing unit which they are aware of and which need to be addressed

Respecting Each Other's Privacy: In this section, it is useful to identify which areas, if any, of the unit the housemate will or will not have exclusive possession of. Also, the principle of respecting personal spaces can be included here, as well as mention of where any confidential personal information regarding the person or the housemate will be kept. The expectation for confidentiality regarding personal information can also be underlined here.

Personal Supporters: In this section, the general arrangement and expectation around the availability of supporters can be stated (that is, that there needs to be a support worker or housemate with the person at all times, or specify when there does not need to be, and which hours the person will be on their own, and in those situations, who will be available etc.)

Anything else: There may be other specific agreements that the person, the family and the housemate want to put in the agreement so that all understand. This might include what the person is clearly not responsible for, such things as driving, ensuring equipment is in working order.....to be discussed between all parties.

Source:

Based on documents developed by a family and an independent facilitator (from *Families for a Secure Future*) to support an individualized residential arrangement.

<http://www.familiesforasecurefuture.com/>

Sample Homesharers' Responsibilities

When people share a home it is important that everyone contribute towards the success of living together. It is important that every person residing in the home is respected as an equal member of the household and that an atmosphere of comfort and mutual respect is fostered.

All Homesharers therefore agree that:

- We will respect each other's privacy
- We won't go into each other's room without permission
- We will be responsible for our own belongings
- We will share equally in the payment of groceries, cable, phone and miscellaneous items for the house
- We are each responsible for our own long distance calls
- We all contribute towards gas when we take trips together
- We contribute to the best of our ability towards household chores.
- We are kind and courteous to each other
- Everyone will be part of decisions being made that affect members of the household (e.g. overnight guests, change in routine, new home sharer)
- We will respect each other's values and beliefs
- We will be confidential about each other's life situation, family, friends and support network
- We remember that our caregivers are "helpers" and not always the "doers"
- That no one is compelled to participate in activities they do not wish to
- That we will respect when someone is not feeling well (Having patience and consideration for the person)
- Compatibility determines residency in the home

We have read, understood and each agrees to be a responsible home sharer.

Signed

Date

Signed

Date

Signed

Date

Source:

Community Living Upper Ottawa Valley
<http://www.communitylivingupperottawavalley.ca/>

5. Other Helpful Documents

Sample Protection from Harm Agreement

I understand that _____ has a fundamental right to be protected from harm in any way whatsoever. I understand that any harm or abuse of _____:

- Is unacceptable
- Will not be tolerated under any circumstances;
- Will result in immediate dismissal;
- May result in charges being laid by _____ and/or family.

Harm or abuse refers to any situation whether physical, verbal, emotional, sexual, or financial in nature demeans, hurts or infringes on _____'s personal rights or dignity or places _____ at risk to personal health and safety. This includes but is not limited to:

- Inflicting physical harm on _____;
- Unwanted or forced sexual contact;
- Unwanted touching or displays of sexual parts;
- Threats of harm;
- Neglect or failure to provide _____ with required medical treatment, food, necessities of life or support which would be deemed threatening to health, safety, or emotional well being;
- Utilizing _____'s money for personal use or for unauthorized purposes.

I understand that I have a legal, moral and professional responsibility to report to _____'s family and/or (the Agency) any knowledge or suspicion of abuse or harm as identified above.

Creating a Respectful Home

I understand it is critical that _____'s home be a place where everyone has the right to be respected, have dignity and be free from any type of harassment. Harassment is any unwelcome comment or conduct that makes a person uncomfortable, embarrassed, offended, coerced or intimidated. A person's conduct becomes harassment when the person knows or ought to know that their action is unwelcome.

I understand that gossip, harassment and offensive comments or conduct can 'poison' _____'s home, are not acceptable under any circumstances and may result in dismissal.

Acknowledged and agreed to by:

Self-employed Support Worker Name

Signature

Date

Source:
Community Living Windsor
<http://www.clwindsor.org/>