



# **Developing Supported Living Services: A Guide to Essentials for Service Agencies and Regional Centers**

**Connections for Information and Resources  
on Community Living (CIRCL)**

**September, 2000**



# **Developing Supported Living Services:**

## **A Guide to Essentials for Service Agencies and Regional Centers**

Developed for

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through a contract with the  
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## Preface

This handbook was written in a way that *sets the bar* for supported living services at a very high level. You will see here a series of expectations for individuals, agencies and the regional center. Some will seem very basic and others more difficult to meet. The premise of this material is that if we set goals that we know will lead to successful outcomes, we will all be better off for the attempt to reach them.

However, we also understand that supported living services are among the most challenging for agencies and regional centers to offer. That there is considerable tension and frustration between what we would all like to have happen and the realities of funding, regulations, poverty and other limits to individual choice.

So, we encourage the reader to use this document with a spirit of collaboration and not as a stick. There are barriers to life quality for all of us. For the people with developmental disabilities that we support, we can aspire to work together to overcome those barriers and to enhance life quality *one person at a time*.



## Introduction

Thousands of individuals with developmental disabilities have chosen to live in ordinary homes of their own. Each year across California others join their ranks. Many of these individuals need ongoing supports and services from others. This handbook is designed for anyone who is interested in learning about the essential ingredients or principles for providing supported living services.

This handbook about supported living services will be especially helpful to you if:

- You are thinking about developing Supported Living Services through a new or existing agency; or
- You work for a Regional Center and your job is to develop new supported living services and review service designs.

This handbook includes information about:

- 1) The fundamental principles of supported living services that give direction to a supported living service agency's mission, policies and practices.
- 2) Things to consider if you are thinking about developing supported living services.
- 3) Ideas for regional centers who want to promote supported living services.
- 4) A checklist for developing or reviewing a service design for supported living services.



## Getting Started

### What are Supported Living Services?

Supported living services (SLS) are a relatively new type of vendored service in California. SLS regulations were first adopted in 1995, however, some agencies have been providing supported living services under other vendor categories, such as independent living, since the mid-eighties.

Supported living services (SLS) provide support to people who want to live in their own homes. This array of services is available to anyone who desires (or whose family, advocate, or conservator desires for them when someone cannot express their own choice) facilitation, instruction, support, and assistance to live in the home of his or her choice.

Here is a good description of supported living services taken from the Lanterman Act (Welfare and Institutions Code 4689).

*Consistent with state and federal law, the legislature places a high priority on providing opportunities for adults with developmental disabilities, regardless of the degree of disability, to live in homes that they own or lease with support available as often and for as long as it is needed, when that is the preferred objective in the individual program plan. In order to provide opportunities for adults to live in their own homes, the following procedures shall be adopted:*

- (a) The department and regional centers shall ensure that supported living arrangements adhere to the following principles:*
  - (1) Consumers shall be supported in living arrangements which are typical of those in which persons without disabilities reside.*
  - (2) The services or supports that a consumer receives shall change as his or her needs change without the consumer having to move elsewhere.*
  - (3) The consumer's preference shall guide decisions concerning where and with whom he or she lives.*
  - (4) Consumers shall have control over the environment within their own home.*
  - (5) The purpose of furnishing services and supports to a consumer shall be to assist that individual to exercise choice in his or her life while building critical and durable relationships with other individuals.*



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- (6) The services or supports shall be flexible and tailored to a consumer's needs and preferences.*
  - (7) Services and supports are most effective when furnished where a person lives and within the context of his or her day to day activities.*
  - (8) Consumers shall not be excluded from supported living arrangements based solely on the nature and severity of their disabilities.*
- 
- (b) Regional Centers may contract with agencies or individuals to assist consumers in securing their own homes and to provide consumers with the supports needed to live in their own homes.*
  - (c) The range of supported living services and supports available include, but are not limited to, assessment of consumer needs; assistance in finding, modifying and maintaining a home; facilitating circles of support to encourage the development of unpaid and natural supports in the community; advocacy and self-advocacy facilitation; development of employment goals; social, behavioral, and daily living skills training and support; development and provision of 24-hour emergency response systems; securing and maintaining adaptive equipment and supplies; recruiting, training, and hiring individuals to provide personal care and other assistance, including in-home supportive services workers, paid neighbors, and paid roommates; providing respite and emergency relief for personal care attendants; and facilitating community participation.*

### **Who Can Receive Supported Living Services?**

Supported living services are available to adults who want and need supports and services to live in homes of their own. Individuals do not have to have any particular skills or meet any entry criteria in order to receive supported living services. In fact, by law, individuals may not be excluded from receiving supported living services solely because of the nature or severity of their disability. The only criterion is that the individual's Individual Program Plan with the regional center stated that supported living services is a needed and requested service.



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#### **Who Provides Supported Living Services?**

There are three ways that supported living services are provided. An individual or their conservator makes a decision about which way they want services provided. The first way - through a supported living service agency - is the most typical way services are provided. Agencies that provide supported living services may have this service as their only purpose or they may provide other kinds of services as well. For example they may also operate a vocational program or they may have licensed group homes. The other ways an individual may receive services is through becoming their own vendor or selecting a family member, or other person close to them, who becomes vendored.

This handbook focuses on the things an agency would want to think about before deciding to provide supported living services. Individuals or families who decide to become vendored to provide their own services may want to talk to others who are vendored this way and discuss the details of becoming a vendor. For more information about individual or family vendored supported living you may want to contact the Department of Developmental Services, Services and Supports Section, 1600 9<sup>th</sup> Street, Room 340, Sacramento, CA 95814, (916) 654-1956.

#### **Who Pays for the Individual to Live in Their Own Home?**

In supported living, an individual pays for her own living expenses (for example, rent, utilities, food, and entertainment) out of SSI, work earnings or other personal resources. The regional center pays the vendor (an agency, individual or family) to provide the supported living services. The individual may also receive other kinds of publicly funded services like MediCal, mental health services, vocational services, and In-Home Supportive Services (IHSS).

#### **Deciding to Become a Supported Living Service Provider**

This handbook will help your agency think about the decision to become a provider of supported living services. Your agency may already be in the business of supporting people to live in their own homes through other types of vendored services like independent living services (ILS) and you may be thinking about adding supported living services or converting from ILS to SLS. Or you may be thinking about getting into the business of supporting people to live in their own homes as a new agency or as a new program to an existing agency.





## The Principles that Guide the Mission, Policies, and Practices of Supported Living Service Agencies

Five important principles (see the following page) set supported living services apart from other kinds of vendored services. These principles are the guiding standards, fundamental values, and the criteria for evaluating supported living service outcomes.

Supported living services achieve these expected outcomes when they are operated by an agency that fully understands the principles of supported living and embraces these principles wholeheartedly at every level of the organization. Every stakeholder in the organization from the Board of Directors to direct support professionals has a part in building and supporting the service. If these principles are kept in view as guideposts, there will be much less chance of the agency taking a wrong turn in its service delivery.

This handbook is organized with a chapter on each of the five principles or standards for supported living services. Within each chapter are:

1. Clarifying questions to help agencies decide whether or not it makes sense for them to provide SLS and to help them think about what might be challenging about providing services.
2. Suggestions for things that regional centers can do to promote the principles of supported living services.
3. A checklist of the kinds of things that an agency may want to include in their service design.

### **What is a Service Design ?**

A service design is a document each agency prepares to describe its mission and explain how it will implement the SLS philosophy. It is one of the most important requirements for becoming vendored to provide services for the regional center.

This handbook includes a checklist of the kinds of things that an agency will want to include in their service design. The checklist addresses each of the five principles or outcome areas for supported living services. The checklist may be useful, not only to agencies, but also to regional centers. The checklist can be used by regional centers make sure that the agency's mission and practices are congruent with SLS philosophy as required in the regulations.



## Supported Living Principles

Supported living services are based on a set of principles or expected outcomes that set the service apart from any other vendored service. These principles give direction to the mission, policies and practices of the agency.

### 1. A Home of One's Own

- Individuals live in homes that they own, lease or rent like other members of their community.
- Individuals choose where they live and with whom and they control what happens in their home.
- Individuals' housing is separate from their services so they are secure in their homes and do not have to move if their needs, their services or their service agency changes.
- Individuals are safe in their home and neighborhood.

### 2. Choice and Self-Directed

- Individuals make their own everyday choices.
- Individuals plan for their futures.
- Individuals direct the services they receive and have a choice of agencies and staff.
- Individuals are supported (e.g., technology, communication devices, behavioral support) to communicate their preferences, choices and needs.
- Individuals are satisfied with the services they receive.

### 3. Relationships

- Individuals have family, friends and neighbors who support them in regular ways or as paid help.
- Individuals and their circle of support work together as a team with the supported living agency and others to share responsibility for his or her well being.

### 4. Community Membership

- Individuals fully participate in the mainstream of community life according to personal choice and preference.
- Individuals have opportunities to join clubs, groups, organizations, and religious groups.
- Individuals use local community resources and generic services.

### 5. Flexible, Tailored Services and Supports

- Individual Service Plans are developed through a person-centered planning process.
- Service plans reflect the support that each individual wants and needs and plans change as wants and needs change.
- Individuals have opportunities to increase their abilities, confidence and quality of life and support to maintain an adequate level of health and safety.



# 1. A Home of One's Own

## Introduction

An essential principle of supported living is that the person who receives services controls every aspect of the place in which he or she lives. Individuals choose where they live, who they live with, and control what happens in their home. In fact they may not receive services in a home in which the SLS agency has any financial or fiduciary involvement unless the individual and the regional center director give consent. In other words the SLS agency usually does not own the home, act in the role of the landlord, or have its name on the lease agreement. In addition, the individual may not receive services in a home where his/her parent or conservator lives.

Supported living services assist each individual to explore the kind of home they want (i.e., house, apartment, mobile home, upstairs, downstairs, garden) and the neighborhood they want to live in. One of the challenges is finding affordable housing in a safe neighborhood. Many SLS agencies lobby on local, state and federal levels for an increase in affordable housing opportunities. They may also assist people to learn about the option of home ownership.

## 1. A Home of One's Own

- Individuals live in homes that they own, lease or rent like other members of their community.
- Individuals choose where they live and with whom and they control what happens in their home.
- Individuals' housing is separate from their services so they are secure in their homes and do not have to move if their needs, their services or their service agency changes.
- Individuals are safe in their home and neighborhood.



#### **Individuals Control the Character and Appearance of their Home**

An important feature of SLS is that individuals control the character and appearance of their home. This means that their homes reflect their personal interests and preferences (i.e., their favorite colors, their interests and hobbies, and the things that are important to them). They choose their furnishings and decorate the way they want. They also decide who has a key to their house and who can come over the threshold into their home.

#### **Individuals Choose Who, if Anyone, They Live With**

Individuals who receive supported living services have the right to choose with whom they live. Supported living agencies learn from the individual whether or not he/she wants or needs a housemate. If a housemate is desired, the agency learns from the individual's lifestyle preferences about the desired personal characteristics of a housemate and what kind of support, if any, will be needed from that person. They will also help the individual hire a housemate and develop and maintain a relationship with that person.

#### **Individuals are Secure in Their Homes**

Most of us feel safe and secure in our homes. Our homes offer us sanctuary from the outside world. We can go home to a safe and comforting place after being out in the world of work, pressure, noise, traffic, and all the others stresses of community life. We also know that we decide whether or not to move to another home or place. Supported living services offer the same kind of security and sanctuary to people with disabilities. Individuals are not at risk of having to move when their services change or their service agency changes.



#### If You are Thinking about Supported Living Services

- How will the agency's method of funding and rates for services (i.e. the rates negotiated with the regional center) be impacted by the choices that individuals may make about where to live and with whom to live?
- What will the agency need to do to assist people to explore all kinds of living arrangement options and to find affordable housing? staff training about housing options? developing working relationships with local housing development corporations?

Agencies who currently own or control housing for the individuals they support may want to consider:

- If an individual chooses not to live in the place the agency owns or has a controlling interest in, how will the agency support this? What will be the financial impact on the agency?
- If an individual chooses to change agencies and receive services from another SLS provider, would they feel under any pressure to leave their home?
- Are there some individuals getting services from the agency who are currently housemates, but who would choose to move apart if given a choice? Individuals receiving SLS have a right to decide whether they want to live with housemates, and if they do, they have the right to choose who the housemates will be. How would the agency deal with such choices when the result conflicts with current arrangements?



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#### **Things the Regional Center Might Do to Support People Living in Homes of Their Own:**

- Work with agencies to develop more affordable housing, non-profit housing development corporations and other housing resources.
- Fund individualized services and do not require agencies to provide services to more than one person at a time unless it makes sense for both people.
- Provide training to regional center staff, SLS agencies, families, and individuals about housing subsidies and home ownership options.



**Excerpt from Service Design Checklist (see Appendix A)**

**Section 1. A HOME OF ONE'S OWN**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

<b>Needs</b>			
<b>Yes</b>	<b>Work</b>	<b>No</b>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals live in homes that they own, lease or rent like other members of their community.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	They choose where to live and with whom and they control what happens in their home.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals are secure in their homes and do not have to move if their needs, services or service agency changes.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals are safe in their home and neighborhood.

Does the narrative in this section include a process for making sure that:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals have the information and opportunity to look at different living arrangements so they can make a choice that make sense for them.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agencies assist individuals in finding and securing their own home as needed or requested.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals or their representatives (for example, family members) are named on the lease, rental agreement or mortgage.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals have a key to their own home and they decide who else has a key and who comes into their home.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agencies have a method for changing individual services as service needs change.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Services are provided in the person's home and in the community at times that make sense for the individual and when preferred.



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## 2. Choice and Self-Directed Services

### Introduction

Supported living services offer an exciting opportunity for individuals to live the way they want to live in their own homes. They choose what to do each day from morning until evening. Also, like other adults, they plan for their futures based on their personal goals and dreams.

### 2. Choice and Self-Directed

- Individuals make their own everyday choices.
- Individuals plan for their futures.
- Individuals direct the services they receive and have a choice of agencies and staff.
- Individuals are supported (e.g., technology, communication devices, behavioral support) to communicate their preferences, choices and needs.
- Individuals are satisfied with the services they receive.



#### **Individuals Direct Their Services**

Individuals who receive supported living services are at the center of planning the services and supports they receive. While their family and friends, their regional center case manager, and the SLS agency participate in the planning process, the individual who receives services has the loudest voice. When an individual is not able to communicate in typical ways, the agency learns about his or her needs and preferences by spending time with them observing their preferences and the things that work and don't work for them. The agency also listens to the people who know and care about the individual to find out how to support him or her.

First, the individual selects an agency (assuming they have decided to use an agency). Then the agency develops an Individualized Service Plan with the individual that reflects the services he or she wants and needs. The service plan describes what services (e.g., cooking, budgeting, hiring of personal assistants), will be provided, who will provide services (e.g., live-in housemate, come in personal assistant, community support facilitator), when services will be provided (e.g., time of day, frequency), and how (e.g., instruction, facilitation, supervision) services will be provided. Just as the individual's needs will be constantly changing, the service plan will be continuously changing to reflect the current needs and desires.

#### **Individuals Choose Who Provides Services to Them.**

Individuals who receive supported living services have the right to choose who will be hired to work with and for them. They also have the right to change staff. In supported living, the individual participates as much as they are able and willing in hiring, training, and supervising staff. The process for hiring looks something like this:

- 1) A person centered planning and assessment process is used to get to know the individual being referred for services.
- 2) The individual's preferences and needs drive the development of job descriptions and employment agreements.



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- 3) The individual is assisted to develop an interviewing and hiring process that works for them. When the individual is not able to participate in interviewing in regular ways (i.e., a sit down question and answer interview) the family or others who know and love the person may help with interviewing.
  
- 4) SLS agencies will usually have serious applicants for support worker positions spend time with the individual. This is the best way for the service recipient to make an informed decision about whether or not they want the person to work with/for them. Also, the applicant has an opportunity to experience spending time with the individual so they can be sure they want the job.

People who are hired to provide supported living services understand that their employment with the person they are supporting is contingent on the person's continued desire to receive services from them. Individuals and their families are regularly asked by the SLS agency and their regional center case manager how satisfied they are with their services and with the staff who work with them.

### **When Making Choices and Communicating is a Challenge: The Challenge is on the Agency**

Many people who receive supported living services communicate their needs and preferences through their behavior (e.g., running to get out of a busy store may mean that someone doesn't like to be in a crowd) or they may use communication devices or adaptations to talk. Supported living agencies learn from each individual, and their family and friends, how the person communicates. They must be good at observation, interviewing, listening, and assisting people to access any assistive technology that will help them communicate. They have a process for person centered planning (even with people who don't use words to communicate) that uncovers all of the things that are important to the person and what the agency needs to know and do to help the individual live the life they want. Agencies use a variety of person centered planning methods.



#### **A Process for Supporting Individuals who Make Risky Decisions**

Supported living agencies struggle with the tension that can come from having two roles in people's lives. One role is to support and encourage the individual to make their own life choices. The other role is to support the person to live a healthy and safe lifestyle. For example, one of the serious challenges that supported living agencies face is supporting individuals who make decisions that jeopardize their health and safety (e.g., choosing to employ someone through IHSS who is negligent in providing the assistance the person needs).

Supported living agencies seek to have a partnership with the individual and to have some influence over the individual if the individual is making risky decisions. They do not take control away from the person but they may offer increased direction and try a variety of strategies to support the person to stay healthy and safe. Supported living agencies work collaboratively with the individual and their family and friends. Together the circle of support uses a problem-solving process to make decisions about whether or not to offer increased support, supervision, or control.

Supported living agencies rarely terminate services to people even when support becomes a challenge. They make a commitment to stick with the person through life's ups and downs and recognize that everyone makes bad decisions at one time or another. Only when an individual is engaging in acts that are seriously jeopardizing their safety and health or the safety of others and the individual is unwilling to accept support and intervention services, would the agency consider ending services.

#### **With rights come responsibilities**

Individuals who receive supported living services have the same rights as other adults living in the community (unless their rights and responsibilities are limited by conservatorship or guardianship.) Along with these rights come responsibilities, including accepting the consequences of one's decisions and actions. For example, individuals are responsible for their financial and legal decisions. It is the agency's job to help the individual recognize all of their options and the possible results of any decisions they may make.



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The Regional Center also has a responsibility to do whatever they can to help a person be safe and healthy. There may be times when, after exhausting all possibilities, including trying a new supported living agency who might have more success with the individual, the regional center might have to refuse to fund supported living services. They may instead offer services that provide more supervision and structure.

### **Individuals Plan for Their Futures**

Supported living agencies assist each individual to clarify their goals, and their dreams for their future. Agencies typically use a person-centered planning strategy to facilitate this process (PATH and MAPS are two readily available examples of this strategy) . They may assist the individual to bring together their family, friends and others who know and care about them to be a part of the futures planning process. SLS agencies understand the power of bringing together the individual's circle of support to increase everyone's commitment to helping the individual move toward their chosen future. The individual's supported living service plan describes the services and supports that the SLS agency will provide to assist him or her to achieve their life goals, as well as how the agency will help coordinate support that the individual receives from other people and agencies.



## If You are Thinking about Supported Living Services

### Person-Centered Planning

- What person-centered planning process or processes will your agency use to get to know the individuals who are referred for services?
- What process will your agency use to assist each individual to develop their Individual Support Plan?
- What process will you use to help individuals develop a plan for their future?
- What role will the individual's family and friends have in the assessment and planning processes?

### Individuals Choose Their Staff

- If the individual can not interview in regular ways (i.e., sit down question and answer interview) how will the agency support them to choose their staff?
- How will the individual's circle of support participate in the hiring, supervising, and terminating process?

### Other things to consider in the area of Choice and Self-Directed Services:

- How will the agency support people with behavioral challenges?
- How will the agency get to know and support the needs and desires of people who don't communicate in regular ways?
- How will the agency support the individual to build a circle of support that will come together to share the responsibility for problem solving if an individual is making risky decisions.
- How will your agency balance the issues around risk and choice? What sort of risk assessment process will the agency use?



#### **If you are already in business:**

If your agency currently provides the kinds of services that require it to make many of the decisions for individuals they support (e.g., where the person lives, what day program, evening or weekend activities, support staff), your agency will want to consider:

- Will current policies or practices create tension or barriers within the agency if the agency moves to supporting people to make their own decisions in everyday and large matters? For example, does the agency have expectations for how people will live in their homes (i.e., curfews, visitors, rules people must follow)?
- What is the comfort level of the agency, and the Board of Directors in supporting the principle of *Choice and Self-Directed Services*?
- What, if anything, will the agency have to change in order to honor an individual's choices in how they live their everyday lives?
- Individuals who receive SLS have a right to choose their staff. What effect will this have on the agency? For example, does the agency currently have staff assigned to apartment complexes or houses where more than one person lives?
- If the agency has a centralized recruitment and hiring process, what would need to change so the process supports the individual's full participation in recruiting, interviewing and hiring?

#### **Things That the Regional Center Can Do to Support Choice and Self-Determination:**

- Encourage/support a teamwork philosophy in working with service provider agencies.
- Expect regional center staff to share in the problem-solving process and do not blame either agency when an individual makes risky decisions.
- Offer training and resources to help your staff and the service agencies become better at supporting people who are challenging to support because of the decisions they make, behavioral challenges, or communication challenges.



**Excerpt from Service Design Checklist (see Appendix A)  
Section 2. CHOICE AND SELF-DIRECTED**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

**Needs**  
**Yes    Work    No**

- An individual makes his or her own everyday choices as well as a plan for the future.
- Individuals direct the services they receive and have a choice of agencies and staff.
- Individuals are supported to communicate their preferences, choices and needs.

Does the narrative in this section include a process for making sure that:

- Individuals have the information and opportunity to look at different living arrangements so they can make a choice that make sense for them.
- The service provider has a procedure for assessing potential risks involved in making choices and staff, individuals supported, family members and others are trained in this process.
- Staff are trained in assisting people to use their support system in making choices.
- Individuals have the optimal means of communication possible and when individuals do not use standard forms of communication, there is a network of support that best represents their interests and wishes.
- Individuals and their families have information about their rights and responsibilities.
- Individuals and families have formal (e.g., internal grievance procedure) methods for grieving decisions.
- The agency mission, strategic plan, policies and procedures all reflect consistent values about choice.





## 3. Relationships

### Introduction

Most of us want, more than anything else, to have people in our lives who care about us and love us. Most people will tell you that their relationships are most important in their lives. People with disabilities are no different. Supported living agencies work hard to support individuals to have caring and durable relationships with community members, family and friends.

It might be said that supported living is *all about relationships*. It's about:

- making a commitment to the individual;
- sticking with them over time;
- acting in the role of extended family;
- staff, individuals, families and friends all standing together to support one another;
- mutual trust and respect;
- understanding and listening to all points of view;
- sharing the values of supported living;
- doing what it takes;
- being able to count on each other;
- staff sharing their family and friends with the individual and the individual's family and friends;
- broadening the person's circle of people who know them and care about them;
- sharing holidays, birthdays, important occasions, and sharing the hard and the sad times.

It may sound corny, but it's often about love.

### 3. Relationships

- Individuals have family, friends and neighbors who support them in regular ways or as paid help.
- Individuals and their circle of support work together as a team with the supported living agency and others to share responsibility for his or her well being.



#### Circles of Support

One of the ways that SLS is different from many other kinds of services is that there is an emphasis on helping the individual to pull together a group of people who make a commitment to help the person figure out how to have a good life. This group of people is sometimes called a *circle of support*.

A circle of support may be formal or informal. Formal circles agree to meet regularly, whereas informal circles may not have meetings at all. Most of us have informal circles of support that include our families, friends, community members and people we pay (e.g., car mechanic, hair dresser, dentist) to support us. Our circles of support most likely never come together as a group unless it is to celebrate or grieve with us. Individuals with disabilities may benefit from having their circle of support come together formally to: learn more about the individual and the people in that person's life; listen to the individual's hopes and dreams for the future; and, to see what support and resources each person in the circle can contribute to helping the individual have a good life.

An individual's circle of support may also come together if the individual is making decisions that place his or her health and safety in jeopardy. During these times the circle is invaluable for supporting the individual's right to make decisions while at the same time providing increased direction or intervention to assist the individual to be safe. An effective circle of support works together within a culture of mutual trust and respect to share responsibility for supporting the individual.

SLS agencies facilitate and support both informal and formal circles of support. This facilitation requires skills in communication, community building, power sharing, negotiation, collaboration, team building, meeting facilitation, and personal futures planning.



#### **If You are Thinking about Supported Living Services**

SLS agencies, by their mission and nature, develop a culture which encourages caring relationships as well as independence. SLS agencies may have a deeper involvement in the lives of the people they support than other kinds of vendored services. The relationships between the agency, the individuals they support and the individuals' families may be more complex than with other services.

- How would your agency facilitate and support the relationships and the services that might be provided by the individual's family, friends and other community members?
- How will your agency view the support that an individual receives from their family and friends?
- If you are already in business, what is your agency's experience working collaboratively with the families of the people who receive services?
- If your agency currently provides services, what, if any, philosophy, policies or practices would need to be changed to support the SLS relationship principles? For example, does your agency have any policies that prohibit your employees from becoming friends with the individuals they support? Are staff allowed to visit with individuals when they are not working? How does the agency and its staff currently work with an individual's family?
- What support and training would your staff get that would help them develop healthy relationships with the individuals they provide services to?



#### **Things That the Regional Center Can Do to Support Relationship Building:**

- Offer training to regional center staff, individuals, families and service providers in circles of support, personal futures planning, relationship building, communication, collaboration, and team building.
- Offer regional center case managers an opportunity to participate in the individual's circle of support. Recognize that circles may get together at the time of day and at a location that works for most of the members and the individual and that case managers may not be able to attend after hours meetings.
- Offer regional center case managers an opportunity to share responsibility for an individual's well being as a member of his or her circle of support.
- Make sure relationship building is included in individuals' SLS service plans. Understand that relationship building takes time and that natural supports may not in every situation reliably replace paid support.



**Excerpt from Service Design Checklist (see Appendix A)  
Section 3. RELATIONSHIPS**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

- |                          |                          |                          | Needs  |
|--------------------------|--------------------------|--------------------------|--|
| Yes                      | Work                     | No                       |  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | An individual has family, friends or neighbors who support him or her in typical ways or as paid help.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The individual and his or her circle of support work together as a team with the supported living agency and others to share the responsibility for his or her well-being. |

Does the narrative in this section include a process for making sure that:

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have opportunities to and support for building and maintaining relationships with family, friends and community members.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individual cultural, ethnic and religious preferences are honored and supported.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have caring, committed support staff who will watch out for and guard against loneliness or isolation, exploitation, abuse and neglect.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have opportunities to learn about relationships, including how to protect oneself against abuse and exploitation, developing and maintaining friendships and love relationships. |



## **Developing Supported Living Services:**

**A Guide to Essentials for Service Agencies and Regional Centers**

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## 4. Community Membership

### Introduction

Supported living service agencies quickly discover that some of the most important and also the most difficult work they do is supporting individuals to become valued members of their local community. Community membership is more than just being present in the community. Membership is about being welcomed and being known by other members of the community. It is about the teller at the bank recognizing the individual and offering help. It is about the checker at the grocery store helping someone reach items difficult to reach from a wheelchair. It is about the church members who invite the individual to lunch after Church on Sunday. It is about being invited to join the neighborhood equestrian club.

### 4. Community Membership

- Individuals fully participate in the mainstream of community life according to personal choice and preference.
- Individuals have opportunities to join clubs, groups, organizations, and religious groups.
- Individuals use local community resources and generic services.

Community membership is especially rewarding for the individual and the community when the individual is a contributing member. For example, the individual may be a volunteer at a local food bank, or regularly help their elderly neighbor mow their lawn.

Sometimes community members and organizations naturally welcome an individual without the assistance of the SLS agency, while other times the agency must be thoughtful and purposeful at facilitating the individual's participation. SLS agencies provide training to their staff in building community connections. Also, staff are encouraged to share their own community connections. For example, if a staff member knows someone who belongs to a bicycle club and the agency supports someone who is interested in riding bikes, the staff person might ask the support of the friend to welcome the individual into the club. The staff member might go with the individual or the agency might even pay the bike club member to be a support person at bike rides.



## If You are Thinking about Supported Living Services

SLS agencies work creatively and purposefully to help people become valued members of their communities:

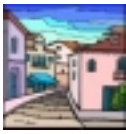
- What will your agency do to help individuals have meaningful community membership? Staff training? Hiring people who have community connections?
- If you are in business now, do any of the current employees or Board members have community connections to clubs, groups, organizations or churches? If yes, could they act as a bridge between an individual who gets services and this community group?
- What does your agency think will be the response of community members and community organizations to people with significant disabilities? What about people with unusual or challenging behavior?
- People will need special transportation so they can participate in community activities that are not accessible through public transportation. How will staff provide transportation? In their own vehicles? What about insurance to cover the agency and the employee? What about transportation for someone who uses a wheelchair?





#### **Things That the Regional Center Can Do to Support Community Membership:**

- Provide training to regional center staff, individuals, families and service providers in community building strategies.
- Fund individualized services and supports so SLS agencies can provide community building services. Fund transportation services when little or no generic transportation is available.
- Maintain lists of resources in the community.
- Participate in community outreach efforts to help the community understand the importance of welcoming people with disabilities.
- Host opportunities for community organizations, generic resources and vendored agencies to come together.



**Excerpt from Service Design Checklist (see Appendix A)  
Section 4. COMMUNITY MEMBERSHIP**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

**Needs**  
**Yes    Work    No**

- An individual fully participates in the mainstream of community life according to personal choice and preference.
- He or she has opportunities to join clubs, groups, organizations, and religious groups and to use local community resources.

Does the narrative in this section include a process for making sure that:

- Individuals have access to generic community services (e.g., a description of local resources) and supports.
- The agency maintains a directory of local community and generic services.
- Support staff are knowledgeable about local community and generic services.
- Staff are trained in building community connections and ways to help individuals become valued community members.
- Individuals are supported in locating and accessing mental and physical health resources.



## 5. Flexible, Tailored Services and Supports

### Introduction

Supported living offers a wide ranging array of services and supports. For a list of the possible kinds of services that SLS agencies offer, please refer to the description of supported living services on page 7. Each person's service plan and pattern of support is developed through a person centered planning process. The services are based on what the individual needs and wants and the services and supports continue as long as the individual wants and needs them. Every individual is unique and the services are individualized for them.

### 5. Flexible, Tailored Services and Supports

- Individual Service Plans are developed through a person-centered planning process.
- Service plans reflect the support that each individual wants and needs and plans change as wants and needs change.
- Individuals have opportunities to increase their abilities, confidence and quality of life and support to maintain an adequate level of health and safety.



## Getting to Know the Person and Planning for Services

Supported living agencies use a person centered assessment process to get to know the person who is referred for services. They may use a process similar to *Essential Lifestyle Planning* or *Getting to Know You* (see References on page 46). They want to discover:

1. What is important to the person in their everyday life.
2. What people, places, activities and things are important.
3. What routines and rituals are important.
4. What the person can do for themselves and what they will need support to do.
5. How the person would like support provided (i.e., time of day, qualities of staff, frequency, order to doing things).
6. The kinds of support the person will need to stay safe and healthy.
7. How the person communicates their needs and desires.
8. What the agency and others will need to know and do to help the individual live in a way that makes sense for them.

This assessment process is done initially to help develop a support plan but the learning and discovery process continues throughout the relationship between the agency and the individual.

## Individual Service Plan

After the SLS agency has spent a sufficient amount of time (the process can sometimes take months) getting to know the person (doing an assessment), the individual, their family and friends, their regional center service coordinator and the agency come together and develop the Individual Service Plan. Support plans quite typically offer a wide range of services and supports based on individual wants and needs.

The Individual Service Plan is expected to change over time as the individual's needs and desires change. The service plan and services and supports always remain responsive to the individual. As stated earlier, the individual continues to live in his or her own home (if so desired) as their needs change.



## Developing Supported Living Services:

### A Guide to Essentials for Service Agencies and Regional Centers

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#### **Flexible, Tailored Services: New Patterns of Staffing, New Job Positions, and New Wage and Labor Laws**

Supported living agencies organize themselves in a number of ways to provide responsive services. SLS staff must be willing to step into many different roles and do many different kinds of jobs. For example, a staff person may be teaching the individual budgeting at the bank (the role of a teacher) and then provide the physical assistance the individual needs to use the restroom (the role of a personal assistant or an attendant). SLS agencies typically require that everyone who works for the agency should be able and willing to provide a variety of kinds of services and support.

SLS agencies may employ people to work either full or part time. They may employ people in traditional or in nontraditional ways such as a paid neighbor (e.g., to be on-call overnight) or a paid community member (e.g., to assist with building community connections). They may also employ someone to live with the individual as a companion or they may employ (or help the individual employ through IHSS), staff who support the individual overnight.

In addition, the SLS agency is expected to maximize the use of generic resources such as In-Home Supportive Services (IHSS). This may mean that there will be times when the individual who receives services will be supported by someone they hire as an IHSS employee - separate from the SLS agency's employ. Sometimes the same person also works (during times they are not working as an IHSS employee) for the SLS agency.

Organizing the personnel resources of a SLS agency can be a challenging task. SLS agencies must become familiar with the federal and state wage and labor laws (e.g., companion, personal attendant, paid housemate) that apply to the variety of jobs they develop. Agencies continually strive to organize the agency to be responsive to each individual's pattern of support, stay within the wage and labor laws, and provide the most cost-effective services possible.



#### **Personal Support Services**

One of the reasons supported living services were first developed was to meet the needs of individuals who wanted to live in their own places but who needed personal assistance or attendant services that they could not receive through IHSS. Some individuals needed more hours of personal assistance services than IHSS would fund. Some individuals needed on-call support to help them when a regularly scheduled IHSS employee did not show up. Some individuals needed help to recruit, hire and supervise their IHSS employees. The health and safety of some individuals was at risk even when they received the maximum number of IHSS hours.

Supported living personal assistance services do not take the place of IHSS, but fill in with the services and hours that IHSS does not include. Also, supported living agencies can assist individuals to hire and supervise their personal attendants.

#### **Responsive Services**

Supported living agencies provide scheduled, agreed upon services, during the time of day and the day of the week that makes sense for the individual. The individual is not fit into the staff's schedule; rather the staff person schedules him or herself according to the individual's schedule and pattern of life or routines.

In addition to providing scheduled services, supported living agencies also assist each individual (as needed) to develop a 24-hour emergency response system. For some, this may involve calling on family or friends in a non life-threatening emergency. Other times, this may mean calling a crisis line. While others may call someone who is paid by the SLS agency to be on-call.

The reasons that individuals need on-call support vary. Some need back-up support if a personal support assistant does not show up. Others need emotional support, crisis prevention support or someone with whom to talk. Supported living agencies may use pagers, cell phones, a 24-hour answering service or a combination of technologies all arranged so that someone is always on-call.



## If You Are Thinking About Supported Living Services

### Individualized Service Planning

Supported living agencies use holistic person-centered planning processes to get to know people referred for services. They also use futures planning processes to assist people to clarify their hopes and dreams for their futures.

- How will your agency get to know people (assess their needs and desires)?
- How will your agency help people plan for their futures?
- If your agency currently provides other kinds of services, what kind of training, if any, will your staff need that they don't have now?

### Individualized patterns of support

Supported living agencies are creative and flexible when they are designing job descriptions, wages and benefits for their staff.

- How will your agency provide this flexible administrative support? For example, some agencies require a personnel committee or a lengthy administrative process to develop a new wage for a new job or for revising job descriptions. When this is the case, the process may be a barrier to providing flexible, tailored services in a timely manner.
- How will the agency support the employment of people in positions that may be new and require different methods of compensation and benefits (e.g., companion, personal assistant, paid housemate, paid neighbor)?
- How would your agency assist individuals to use IHSS? How would you help them recruit, screen, hire, train and supervise?

### Full array of services

- If your agency currently provides instructional services like independent living services, how will you support people who are not able to learn to do a skill and instead need someone to do it for them?
- What is the attitude of current staff about providing personal support services (e.g., bathing, personal care)?



## Developing Supported Living Services:

### A Guide to Essentials for Service Agencies and Regional Centers

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#### Responsive services

- What is the willingness of current staff to work new hours of the day and week (e.g., evenings, overnight, weekends, holidays)?
- How will your agency organize its staff and resources so that the agency can be responsive if someone needs unplanned, unscheduled help in a hurry? For example, what kind of on-call system will you set up? How will on-call staff or others be reached when they are not in the office or it is after office hours?

#### Things That the Regional Center Can Do to Support the Practice of Flexible, Tailored Services in SLS Agencies:

- Provide training to regional center staff, individuals, families and service providers in person centered planning and person centered services (e.g., *Essential Lifestyle Planning, Getting to Know You*).
- Provide adequate funding for an assessment period and allow agencies the time they need to get to know the individual so the services and supports are really tailored to the individual.
- Make it easy for agencies to change the Individual Service Plan when an individual's needs and desires change.
- Provide funding for services that are provided at the time and place that make sense for an individual. For example, fund individualized services in the person's home and in their neighborhood, rather than funding group instruction at the agency's office or program site.
- Provide advocacy and information on issues that will help agencies provide flexible and responsive services such as: employment arrangements and labor laws, integrating IHSS into regional center funded services, developing cost effective services, etc.





**Excerpt from Service Design Checklist (see Appendix A)  
Section 5. FLEXIBLE, TAILORED SERVICES AND SUPPORTS**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

	<b>Needs</b>	
<b>Yes</b>	<b>Work</b>	<b>No</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

An individual has a service plan which is developed through a person-centered planning process.

The plan reflects the support that the individual wants and needs.

Services offer the individual opportunities to increase his or her abilities, confidence and quality of life.

Does the narrative in this section include a process for making sure that:

**Individual Support Plan**

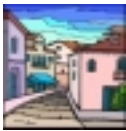
There a defined process for developing written support plans that keep the individual at the center in the development of the plan.

The planning process results in a support plan that: (1) builds on an individuals' strengths and gifts; and (2) indicates opportunities to learn new things, to have fun, to develop relationships, to be a part of their community, to expand who they are and what they do, to gain more respect and status and to have a stable, happy life.

Individual support plans are: (1) written in understandable and respectful language; (2) include action steps for accomplishments and accountability; (3) have a method for reviews and updates; (4) are creative in the use of vendored, generic and natural supports; and (5) are cost effective.

Individual support plans show adequate planning for health and safety needs and include plans for possible emergencies and disasters.

Support plans are detailed enough to know who is responsible for what and there is a method of documenting health and safety issues.



## Developing Supported Living Services:

### A Guide to Essentials for Service Agencies and Regional Centers

**Needs**  
**Yes** **Work** **No**

#### **Training**

The agency has a training program for new staff which includes the basics of supported living and agency related information, plus an emphasis on training that is specific to the individuals they help support. Staff receive training prior to assuming support service responsibility.

Individuals, families, and support staff receive training in issues related to abuse, neglect and exploitation.

**Needs**  
**Yes** **Work** **No**

#### **Health and Safety**

There are established policies and procedures for addressing potential threats to an individual's health and safety, including a conflict resolution process for disagreements about issues of health, safety or risk.

Individuals have an emergency back up system for support in a crisis.

Support staff and significant others are trained in addressing health and safety issues.

Individuals with challenging behavior are provided with positive behavior support.

The agency hiring process includes a method for screening potential employees with criminal or harmful backgrounds or attitudes.

The agency has an established process for monitoring the performance of employees and the process includes individuals who receive services.



## Developing Supported Living Services:

### A Guide to Essentials for Service Agencies and Regional Centers

Needs			
Yes	Work	No	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Evaluation</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The agency has established methods of supporting positive staff performance; support staff feel valued and like their work.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Job descriptions reflect individualized support needs, health and safety expectations and are congruent with agency policies on choice, relationships and community membership.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The agency has ongoing formal and informal ways to evaluate service satisfaction from individuals, regional center and other interested parties.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The agency has ongoing formal and informal ways to evaluate support service effectiveness and fiscal efficiency.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from the agency evaluation process is used to make decisions about changes in service as needed.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals and their families have access to service agency administrators to discuss problems or concerns as appropriate.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals and families have an active role in the organization, including the board of directors, hiring of support staff and strategic planning.



## The First Steps if You Are Thinking About Developing Supported Living Services

Is your agency interested in becoming vendored to provide supported living services? If so, you will want to:

1. Talk to the resource development staff at the regional center and find out if services are needed.
2. Find out about the regional center's vendorization process.
3. Get a copy of the most recent regulations on Supported Living Services. These regulations are available by contacting the Department of Developmental Services, Services and Supports Section, 1600 9<sup>th</sup> Street, Room 340, Sacramento, CA 95814, (916) 654-1956.
4. Develop the agency Service Design using the checklist in this handbook and the SLS regulations as guides.
5. Submit the Service Design and other required materials to the regional center.

If you reach any barriers along the way you can get help by calling the Department of Developmental Services, Services and Supports Section, at (916) 654-1956. You can also get help from others who are already providing supported living services. Your regional center can tell you who is providing supported living in your area.

You can also get help from Connections for Information and Resources on Community Living, CIRCL, by calling Becky Donofrio at (626) 447-5477, Claudia Bolton at (530) 621-1933 or Vickie Vining at (818) 752-7484. CIRCL's mission is to create opportunities for building and sharing individual, organizational and community strengths in supported living.



## Conclusion

This handbook is intended to familiarize agencies and regional centers with the essential principles that drive the wide range of services called supported living. To summarize, those essential principles are:

**Individuals live in homes of their own in safe neighborhoods of their choice.**

**Individuals make choices about their everyday lives, the services and supports they receive and their plans for the future.**

**Individuals have a circle of support which works together as a team to share responsibility for his or her well being.**

**Individuals participate in the community and use local resources as they choose.**

**Individual services and supports are tailored and flexible and help maintain a safe and healthy lifestyle.**

Whether developing a new supported living agency or a new service within an existing agency, it's important to consider how your organization will promote the above principles. Using the *Checklist for Development and Evaluation of a Supported Living Service Design* (see Appendix) will help you integrate the principles into the planning, direct support, staff training, and evaluation aspects of your service.

Supported living services are among the most challenging services for agencies and regional centers to offer. One challenge is mainly to the way we think. To be effective helpers and supporters means first understanding and embracing the ideals of supported living, and then creating an organizational culture that truly reflects its fundamental principles. The second challenge, of course, is to bring our efforts to bear positively on the real lives of the individuals we serve, with all the struggle, uncertainty, and setback that living a full life always includes. But the rewards are great as well. For when you are there for individuals who want to live in homes of their very own - especially when the odds seem stacked against them - you share not only the struggle but the wonder and joy of their achievements. If this is where you want to go, there is no better time to start the journey.



## References

### **A Guide to Developing Community Connections**

Compiled by Patsy Davies & Claudia Bolton (1996); Self-Published; available from Allen, Shea & Associates, 1780 Third Street, Suit CA 94559.

A user-friendly workbook that can help connect people to community.

### **Developing First Plans! A Guide to Developing Essential Lifestyle Plans**

by Michael Smull & Bill Allen (1999) Published by Allen, Shea & Associates

Essential lifestyle planning is one form of person centered planning. This workbook is provided to individuals who are receiving training in this planning process.

### **Getting to Know You: Planning for Services in Supported Living**

by Claudia Bolton & Bill Allen (revised, 1999); Published by CIRCL

This workbook was developed using elements from two methods of person centered planning, the *Personal Profile* and *Essential Lifestyle Planning*. The integration of these two methods can assist supported living agencies to begin to know and understand a person referred for services. Getting to know someone is an ongoing process of uncovering who they are and what is important to them.

### **Patterns of Supported Living: A Resource Catalogue**

by Allen, Shea & Associates and Claudia Bolton (1993); Published by California Department of Developmental Services

This catalogue of resources represents the experiences and thoughts of people throughout California, the United States and Canada. It draws upon the work of people who have been pioneers in helping people with developmental disabilities achieve supported lives and in developing supported living services.



**Appendix**  
**Checklist for Development**  
**and Evaluation of a**  
**Supported Living Service Design**



## **Developing Supported Living Services:**

**A Guide to Essentials for Service Agencies and Regional Centers**

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# Checklist for Development and Evaluation of a Support Living Service Design <sup>1</sup>

**Name of Agency:** \_\_\_\_\_

**Name of Reviewer:** \_\_\_\_\_

**Date of Review:** \_\_\_\_\_

## Section 1. A HOME OF ONE'S OWN

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

- | Needs                    |                          |                          |   |
|--------------------------|--------------------------|--------------------------|---|
| Yes                      | Work                     | No                       |   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals live in homes that they own, lease or rent like other members of their community.                     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | They choose where to live and with whom and they control what happens in their home.                              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals are secure in their homes and do not have to move if their needs, services or service agency changes. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals are safe in their home and neighborhood.  |

Does the narrative in this section include a process for making sure that:

- |                          |                          |                          |   |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have the information and opportunity to look at different living arrangements in order to make a choice that make sense for them. |
|--------------------------|--------------------------|--------------------------|---|

**Notes**

<sup>1</sup> Outline for service design was developed with assistance from materials provided by **Vickie Vining and Associates** and Title 17.



## Checklist for Development and Evaluation of a Support Living Service Design

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Needs			
Yes	Work	No	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agencies assist individuals in finding and securing their own home as needed or requested.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals or their representatives (for example, family members) are named on the lease, rental agreement or mortgage.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals have a key to their own home and they decide who else has a key and who comes into their home.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agencies have a method for changing individual services as service needs change.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Services are provided in the person's home and in the community at times that make sense for the individual and when preferred.

**Notes**

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**Recommendations for Design Revisions:**



**Section 2. CHOICE AND SELF-DIRECTED**

**Notes**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

- | Needs                    |                          |                          |   |
|--------------------------|--------------------------|--------------------------|---|
| Yes                      | Work                     | No                       |   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | An individual makes his or her own everyday choices as well as a plan for the future. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals direct the services they receive and have a choice of agencies and staff. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals are supported to communicate their preferences, choices and needs.        |

Does the narrative in this section include a process for making sure that:

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have the information and opportunity to look at different living arrangements in order to make a choice that make sense for them.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The service provider has a procedure for assessing potential risks involved in making choices and staff, individuals supported, family members and others are trained in this process. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Staff are trained in assisting people to use their support system in making choices.   |



## Checklist for Development and Evaluation of a Support Living Service Design

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Needs  
Yes Work No

Individuals have the optimal means of communication possible and when individuals do not use standard forms of communication, there is a network of support that best represents their interests and wishes.

Individuals and their families have information about their rights and responsibilities.

Individuals and families have formal (e.g., internal grievance procedure) method for grieving decisions.

The agency mission, strategic plan, policies and procedures all reflect consistent values about choice.

Notes

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**Recommendations for Design Revisions:**



**Section 3. RELATIONSHIPS**

**Notes**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

- | Needs                    |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| Yes                      | Work                     | No                       |  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | An individual has family, friends or neighbors who support him or her in typical ways or as paid help.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The individual and his or her circle of support work together as a team with the supported living agency and others to share the responsibility for his or her well-being. |

Does the narrative in this section include a process for making sure that:

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have opportunities to and support for building and maintaining relationships with family, friends and community members.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individual cultural, ethnic and religious preferences are honored and supported.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have caring, committed support staff who will watch out for and guard against loneliness or isolation, exploitation, abuse and neglect.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have opportunities to learn about relationships, including how to protect oneself against abuse and exploitation, developing and maintaining friendships and love relationships. |



## Checklist for Development and Evaluation of a Support Living Service Design

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### Recommendations for Design Revisions:



**Section 4. COMMUNITY MEMBERSHIP**

**Notes**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

Needs		
Yes	Work	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

An individual fully participates in the mainstream of community life according to personal choice and preference.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

He or she has opportunities to join clubs, groups, organizations, and religious groups and to use local community resources.

Does the narrative in this section include a process for making sure that:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Individuals have access to generic community services (e.g., a description of local resources) and supports.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

The agency maintains a directory of local community and generic services.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Support staff are knowledgeable about local community and generic services.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Staff are trained in building community connections and ways to help individuals become valued community members.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Individuals are supported in locating and accessing mental and physical health resources.



## Checklist for Development and Evaluation of a Support Living Service Design

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### Recommendations for Design Revisions:





**Section 5. FLEXIBLE, TAILORED SERVICES AND SUPPORTS**

**Notes**

Does the narrative in this section indicate agency philosophy, policy and practice that will result in the following outcomes:

- | Needs                    |                          |                          |   |
|--------------------------|--------------------------|--------------------------|---|
| Yes                      | Work                     | No                       |   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | An individual has a service plan which is developed through a person-centered planning process.               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The plan reflects the support that the individual wants and needs.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Services offer the individual opportunities to increase his or her abilities, confidence and quality of life. |

Does the narrative in this section include a process for making sure that:

- |                          |                          |                          | <b>Individual Support Plan</b>   |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | There a defined process for developing written support plans that keeps the individual at the center in the development of the plan.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The planning process results in a support plan that: (1) builds on an individuals' strengths and gifts; and (2) indicates opportunities to learn new things, to have fun, to develop relationships, to be a part of their community, to expand who they are and what they do, to gain more respect and status, to have a stable, happy life. |



## Checklist for Development and Evaluation of a Support Living Service Design

Needs			
Yes	Work	No	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individual support plans are: (1) written in understandable and respectful language; (2) include action steps for accomplishments and accountability; (3) have a method for reviews and updates; (4) are creative in the use of vendored, generic and natural supports; and (5) are cost effective.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individual support plans show adequate planning for health and safety needs and include plans for possible emergencies and disasters.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Support plans are detailed enough to know who is responsible for what and there is a method of documenting health and safety issues.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Training</b> The agency has a training program for new staff which includes the basics of supported living and agency related information, plus an emphasis on training that is specific to the individuals they help support. Staff receive training prior to assuming support service responsibility.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals, families, and support staff receive training in issues related to abuse, neglect and exploitation.

## Notes



## Checklist for Development and Evaluation of a Support Living Service Design

Needs  
Yes Work No

Notes

- | Needs                    |                          |                          |  | Notes |
|--------------------------|--------------------------|--------------------------|--|-------|
| Yes                      | Work                     | No                       |  |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Health and Safety</b><br>There are established policies and procedures for addressing potential threats to an individual's health and safety, including a conflict resolution process for disagreements about issues of health, safety or risk. |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals have an emergency back up system for support in a crisis.  |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Support staff and significant others are trained in addressing health and safety issues.   |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Individuals with challenging behavior are provided with positive behavior support.   |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The agency hiring process includes a method for screening potential employees with criminal or harmful backgrounds or attitudes.   |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The agency has an established process for monitoring the performance of employees and the process includes individuals who receive services.   |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <b>Evaluation</b><br>The agency has established methods of supporting positive staff performance; support staff feel valued and like their work.   |       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Job descriptions reflect individualized support needs, health and safety expectations and are congruent with agency policies on choice, relationships and community membership.  |       |



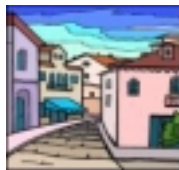
## Checklist for Development and Evaluation of a Support Living Service Design

Needs				Notes
Yes	Work	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The agency has ongoing formal and informal ways to evaluate service satisfaction from individuals, regional center and other interested parties.	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The agency has ongoing formal and informal ways to evaluate support service effectiveness and fiscal efficiency.	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information from the agency evaluation process is used to make decisions about changes in service as needed.	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals and their families have access to service agency administrators to discuss problems or concerns as appropriate.	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individuals and families have an active role in the organization, including the board of directors, hiring of support staff and strategic planning.	

**Recommendations for Design Revisions:**



**Recommendations for Design Revisions:**



**Developing Supported Living Services:  
A Guide to Essentials for  
Service Agencies and Regional Centers**

**Connections for Information and Resources  
on Community Living (CIRCL)  
September 2000**