

SHARED LIVING RESOURCE GUIDE

A TOOLKIT
OF IDEAS
TO SUPPORT
GOOD LIVES
IN COMMUNITY



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INTRODUCTION

Shared living represents the promotion of a principled and aspirational vision; a real community life, lived with others, and where the right of citizenship, belonging, and a rich quality of life for individuals with developmental disabilities are championed and promoted.

SHARED LIVING IN BRITISH COLUMBIA: SETTING THE CONTEXT

In order to ensure that individuals with developmental disabilities are able to live good lives in their communities around our province, we must pay particular attention to the quality and stability of the homes that they reside in. Community Living BC (CLBC) provides a range of supports and services to eligible adults and their families including a variety of residential options. This resource focuses on shared living arrangements.

Shared living is a residential option in which an adult with a developmental disability shares a home with someone who is contracted to provide ongoing support. The home is the primary residence of both the person receiving supports and the individual(s) providing them. This residential option may be offered by community based agencies who play a coordination role for the various home sharing situations, or in limited situations, through a contract directly negotiated with CLBC. Shared living encompasses a variety of options including: **home sharing**, in which the home is owned or rented by the home sharing provider, or **live-in support** in which the home is owned or rented by the person requiring support. In some situations, the home sharing provider's family lives in the home. In others, people live together in a roommate situation or an individual maintains a semi-private suite in a residence. The important and common criteria should be that the home environment reflects the needs, wishes, and choices of everyone involved and provides meaningful opportunities for a full life lived as a member of community.

In many situations, these shared living arrangements are designed to provide not only a place to live, but are also providing opportunities to cultivate very close relationships. The people within the shared residence are looking to share not only the physical space but also their lives. In these circumstances, the members of the home make it a priority to spend a lot of time together and are actively involved in one another's daily lives and activities. In other situations, the arrangement is characterized by more independent relationships and members of the household generally go their own ways, coming together at specific times or for specific purposes.

In B.C., the concept of shared living, and the variations it encompasses, represents an evolution from other residential arrangements in community living which have existed over the years including proprietary care facilities¹ and staffed group homes. More specifically, shared living represents the promotion of a principled and aspirational vision; a real community life, lived with others, and where the right of citizenship, belonging, and a rich quality of life for individuals with developmental disabilities are championed and promoted.

¹ Proprietary care was typically provided in large, congregate settings where many people might reside with paid staff supporting them.

There are currently two ways that shared living options are contracted. In agency coordinated home sharing situations, the agency is responsible for providing support to the home sharing providers with whom they contract. The agency is also then responsible for monitoring home sharing services to ensure that they meet the necessary requirements and standards and that health and safety of the person is honoured. These agency accountabilities are defined in a contract between the agency and CLBC. The expectation is that the agency is the primary contact with the home share provider and will manage all aspects of the relationship including recruitment, contract oversight, crisis response, and coordination of adjunct community supports, when needed, in partnership with the provider.

In circumstances where CLBC contracts directly with home sharing providers, analysts in CLBC's quality service offices are responsible for providing support to the home sharing providers as well as monitoring the home sharing services to ensure that they meet the necessary requirements and standards. In these situations CLBC fulfills the role an agency would play.

Shared living, both home sharing and live-in support, has emerged as the preferred residential option in B.C. in the past few years. While CLBC still retains the option, on an exceptional basis, to directly contract with home share providers, in the past decade the trend has been to actively recruit qualified agencies to provide coordination, support, and monitoring of these residential arrangements. Feedback from both externally conducted research projects, and service providers in the community living sector, identified that agencies are better positioned to provide the necessary levels of oversight, coordination, and provide supportive responses required to ensure home sharing arrangements achieve their intended goals. Further, community based agencies are better able to develop and sustain the critical relational dimensions of the coordination role that inspire quality and capacity with home share providers.

Shared living has shown dramatic growth throughout British Columbia over the past 10 years. In 2007, CLBC reported that the model accounted for close to 50% of residential services in the province, supporting 2207 individuals, as compared with staffed residential resources, which, at that time, supported 2,850 individuals. In 2015, these same comparisons have shifted; CLBC now reports that shared living serves over 3400 individuals and staffed residential resources serve approximately 2400 people.

The rapid growth in shared living has presented unique challenges, opportunities, and increased expectations for agencies that coordinate these services. For example, a proportion of the contracts transferred from CLBC to agency coordination, pre-date the development of the accountabilities and philosophies associated with what we describe as shared living. These contractors may have had limited experience with regular monitoring, enhanced documentation requirements, or current standards having been initially recruited

as foster care providers. They may be unsure about what the agency coordination role entails and perceive they have lost their autonomy.

Similarly, agencies delivering services under contract with CLBC, may be interested in or asked to coordinate home share living arrangements, but may not have had experience in this model. As a result, it has been recognized that agencies need support to build their capacity in the areas of infrastructure, training, documentation, monitoring processes, and nurturing staff competency. CLBC staff also requires the opportunity to develop knowledge and experience in order to be responsive and supportive in their working connections with community based agencies. In this dynamic and growing area of services, access to information, resources, and the experience of others can serve to promote better outcomes for individuals with developmental disabilities whose lives, hopes, and dreams are significantly influenced by the quality of their living situations.

Interest in supporting the stability of shared living arrangements has been championed by a variety of organizations and working groups. Inclusion BC (formerly BCACL) has hosted three forums with a broad cross-section of service providers to identify challenges and opportunities with this model. Both CARF and COA, the two accreditation bodies most often used by community living service providers in BC, have also worked to develop standards to support organizational conformance and enhance quality assurance. Likewise, in support of continuous quality improvement across the service system, CLBC commissioned an independent review of home sharing service. The review was initiated in January of 2013; Dr. Anne Hughson from the University of Calgary conducted the review.²

The review report focused on the strengths and risks associated with this residential option in order to assist with identifying an overall approach which would promote safety, well-being, and quality of life for individuals living in home sharing as well as the role of CLBC in that regard. In response, CLBC has developed a 5 year plan which addresses the recommendations arising from the review. This plan includes commitments in the areas of communication, monitoring, managing growth and quality, training, and other issues of consideration.

ORIGINS OF THIS RESOURCE GUIDE

In 2007, the Successful Practices in Home Sharing Provincial Working Group, a collaborative undertaking between service providers and CLBC, was formed. The intent of this group was

² This review can be located at: (www.communitylivingbc.ca/2014/02/clbc-home-share-review-released/). For further information about the response, visit <http://www.communitylivingbc.ca/wp-content/uploads/Homeshare-5-Year-Plan-May-2015.pdf>

to work to ensure that shared living supports are provided consistently across BC and that this residential model remained an option of both integrity and long term sustainability. While acknowledging that shared living is only one of many residential options that exist in the province, the proliferation of the model meant that actively nurturing a sustained focus on successful practices was considered both relevant and necessary. During their tenure, the Provincial Working Group undertook a number of projects, including, but not limited to:

- ❖ Reviewing and revising the Standards for Home Sharing;
- ❖ Identifying successful practices for shared living Addressing issues related to sustainability (e.g. recruitment, retention, training, & crisis response);
- ❖ Providing guidance on risk management practices important to this residential option; and;
- ❖ Raising awareness of the values and vision of shared living as a residential option that can support individuals with developmental disabilities to lead good lives in welcoming communities.

In response to the continuing growth in shared living services, the Working Group determined that creating a **Shared Living Resource Guide** would benefit the sector. While the former Working Group has since been disbanded, in its stead members of the CEO Network of BC have reactivated a focus on shared living and building capacity within the service sector. In conjunction with CLBC, members of a CEO Network designated Home Share Working Group have provided invaluable input and resources to help complete this resource.

DESIGN OF THE GUIDE

This **Resource Guide**, much like the emergence of knowledge about successful practices in the sector generally, is designed to be an iterative process benefitting from regular updates as new ideas and information becomes available. This **Resource Guide** has been written in sections, to provide readers of this guide with a framework of key topics as well as an initial foundational offering of information and sample resources. The **Guide** does not purport to be the definitive resource on shared living, but rather, a compendium of ideas and tools which can be drawn upon to promote excellence in services and supports to individuals with

developmental disabilities. As such, this **Guide** to shared living is not a textbook, nor a conversation about beds or facilities or placements. Rather, it is a resource which emphasizes the values inherent to creating the opportunity for people with developmental disabilities to have a home and people to share their everyday lives with. It is a resource about how to support people living together in long term relationships as members of our communities.

The **Resource Guide** is indexed according to key topic areas associated with successful practices in shared living. Included are samples of documents, resources, and tools that have been developed by a variety of service providers with experience in this area. The range of experience and expertise regarding providing shared living services varies significantly across the service provider community. As such, some resources and ideas presented in this **Guide** will seem quite introductory for many service providers but be new to others just taking up this role and responsibility area. These reference samples have been generously provided to support the usefulness of this **Guide**. They may be used as reference in the development of your own documents and procedures.

SHARED LIVING AND SHARED LIVES

The search for home, for the fulfillment experienced through meaningful relationships and a shared life, transcends disability.

FINDING HOME: PHILOSOPHY AND VALUES OF SHARED LIVING

Shared living, at a purely descriptive level, is a situation in which an adult with a developmental disability shares a residence with someone who provides support tailored to the personal needs and interests of the individual. The support needed and provided varies and can include: a furnished room and other space in the home, assistance with self-care and relationship building, support to manage health issues, learning life skills, meal preparation, personal care, accessing employment, and the use of community resources and services.

Beyond these formal and quantifiable dimensions, and potential responsibilities undertaken by a supportive shared living provider, shared living is much more than a job or set of tasks or the offer of a bed, because it has, as its primary intention, the creation of a long term relationship. Shared living is, at its best, a commitment to sharing lives and creating a home together.

The search for home, for the fulfillment experienced through meaningful relationships and a shared life, transcends disability. They are intimate and experiential concepts reflecting individual and highly subjective perspectives, needs, and circumstances. For many individuals with developmental disabilities, especially those who have lived in institutions or perhaps have been separated from their families for other reasons, the yearning for familial relationships and home are often more profound needs and desires that have remained unfulfilled in the more traditional models of residential service that have been provided. Shared living can offer the opportunity to have these needs met. The challenge when support needs are present for an individual, and contracts and outcomes define and dictate responses to those needs, is that the pursuit of an authentic relationship can become sublimated to service delivery systems, goals, and structures.

For most of us, our homes and how we live in them are an essential part of how we create stability and literally and figuratively locate ourselves in our communities. Our homes offer refuge at the beginning and end of each day, allow us to welcome friends and family and control when they visit, provide security for our belongings and our being, and support the unique expression of our personal tastes and preferences. They afford us the opportunity to come and go as we please, authority over how we decorate and embellish our spaces, and the opportunity to spend time alone and with others as we choose.

Shared living arrangements for individuals with developmental disabilities must honour the intrinsic, human yearning for home and for all that it can contribute to our well-being. Our

responsibility to those we support requires that we strive to honour these values and ideals; that we remain mindful about what is at stake for the people we serve.

FROM INCLUSION TO BELONGING...

Fulfilling the goals and vision of the community living movement in British Columbia and elsewhere, has been the active commitment of, families, individuals, service providers and advocacy organizations for over 60 years. Despite the changes and progress that has been made with and for individuals with developmental disabilities, we know that opportunities for a good life in welcoming communities with friends and valued identities still remains very limited for many people. Many individuals with developmental disabilities struggle with loneliness and isolation and still rely primarily on people paid to be in their lives to meet their need for relationships. While supportive services are often needed to help support day-to-day living in community, what is equally necessary to a fulfilled life are friendships and an authentic sense of belonging.

We are social beings. The social ties of kinship, friendship, and participation as well as the psychological ties of attachment, identity, and a sense of belonging to a place or a group, are vital human needs and desires. Without them, we may have lives that are replete with physical comforts, but impoverished in terms of our hearts. Shared living, if promoted and sustained with integrity, offers a way to deepen relationships through the intimacy and sense of belonging found at home, with those who care about us, welcome us, and look forward to our return each day.

THE BENEFITS OF SHARED LIVING

The experiences of individuals, families, and service providers participating in shared living emphasize the value of this type of supportive residential option. Observations from these different perspectives indicate many positive outcomes are possible, including:

- ❖ Shared living offers a more typical and natural home environment where the rhythm of daily routines and relationships take on a heightened focus;
- ❖ Greater personal control and self-determination can be achieved for individuals as choices can be expressed and honoured with greater ease than is typically possible in group living situations (such as staffed residences);

- ❖ The potential for reciprocity is enhanced: opportunities for growth, friendship, and community connections are fostered for both the individual and the shared living provider;
- ❖ Individualized support is the focus thereby creating enhanced opportunities to develop skills and capacities in a nurturing environment;
- ❖ A life lived in a more typical community setting has the potential to influence others' perceptions of individuals with developmental disabilities. The stigma of being a "consumer of services" is reduced;
- ❖ Personal safeguards can be naturally developed through the informal connections that neighbourhoods and community connections support;
- ❖ Individuals can be supported to experience the inherent dignity of risk in supportive environments that offer choice and mentoring;
- ❖ Shared living may help shift the balance of power from the status of 'service user' to housemate and friend.

Shared living may not be the choice that every individual will make, or even the ideal option in every instance where residential supports might be needed. To borrow a familiar phrase, it is not a 'one size fits all' model. However, if our common commitment is a good life for individuals with developmental disabilities, shared living is an important option to both promote and continue to strive for excellence in.

CORE PRINCIPLES TO UPHOLD

Through the initiative of the Successful Practices in Shared Living Provincial Working Group, **Principles of Quality for Shared Living** were established. They reflect the overall vision, mission, and values of CLBC, and service provider partners, and articulate characteristics of high quality living arrangements. These core principles are:

- ❖ Support is provided in a manner that respects the individual's right to make choices, lead planning, and direct service;

- ❖ Services are regularly reviewed and appropriately adjusted to meet the evolving needs and preferences of the individual;
- ❖ Individuals have the opportunity to participate in valued social roles, experience the rights of citizenship, and contribute to community in a personally meaningful way;
- ❖ Individuals are treated with dignity and respect;
- ❖ Religious, cultural, and/or lifestyle affiliations and traditions are honoured;
- ❖ Individuals have the right to live in a safe environment;
- ❖ Individuals have the opportunity for personal growth and skill development;
- ❖ Family, friends, and members of the individual's personal network are welcomed by those providing support and their involvement is encouraged.

These core principles define a vision that honours the need for support, but imagines a life more expansive than mere service. These principles are intrinsic to CLBC's vision of "good lives in welcoming communities" for individuals with developmental disabilities, as well as the hallmarks of person centred services for agencies providing supports.

HONOURING CHOICE AND VOICE: ENSURING PERSON-CENTRED THINKING

“A name can communicate both vision and expectation. The term shared living emphasizes the vision that people will live together and share experiences. It communicates mutuality: A real community life, not a service life, is the expectation.”

- Smull, Bourne & Sanderson, Best Practice, Expected Practice & the Challenge of Scale

The **Principles of Quality for Shared Living** reflect both CLBC and service provider responsibilities and commitments to the values and process of person centred planning as well as establishing expectations regarding service delivery. Experienced community based agencies have also confirmed that honouring the individual's wishes, dreams, needs, and goals is essential to the success of crafting positive, successful, and fulfilling shared living arrangements.

THE HEART OF THESE MATTERS

Honouring a commitment to person-centred planning begins with a deeply held respect for each individual and their right and capacity to exercise self-determination about their life and how they live it. At the heart of supporting an individual to plan is the ability and willingness to listen deeply and authentically to their voice, however they communicate. For some individuals, who may have had little experience articulating their wishes and dreams, the process of building a relationship of trust, that will support creating a comprehensive and accurate portrait of who they are, will take time.

The process is as critical as the outcome; successful outcomes can only be achieved through listening deeply to and with the individual as they consider what they want their home and relationships to be like.

A personal plan represents a holistic portrait of the individual created with the active involvement of the person, and wherever possible, their family and members of their support network. This inclusive process helps ensure that the plan represents the wishes and dreams, preferences, and needs of the person. The plan should also reflect a respectful and responsible balance of support that enables an individual to experience the dignity of risk, buttressed by supports that provide safeguards for protecting health, safety, and well-being. **Just as each person is unique; no two plans will be alike.**

Plans are works in progress and must take into consideration the unique attributes, strengths, interests, cultural and religious expression, age, health concerns, and activities of the person. CLBC has created Standards for Home Sharing with respect to planning which service providers should be familiar with. In addition, accrediting bodies such as CARF and COA define elements of a comprehensive planning process they expect organizations to conform to.

An individual plan should encompass the key areas of:

- ❖ Health and personal assistance which may be required;

- ❖ Employment: current and aspirations for work opportunities;
- ❖ Personal goals, interests, and activities;
- ❖ Cultural and spiritual practices;
- ❖ Lifestyle preferences;
- ❖ Individual indicators of quality of life for the person;
- ❖ Learning opportunities they wish to pursue;
- ❖ Community contributions they are interested in, including volunteer options;
- ❖ Individual support needs in the areas of: daily living, personal support, communication, and behaviour as well as how those needs are respectfully addressed including appropriate safeguards which should be implemented.

Planning processes vary as do the methods of recording them. PATH is one popular method for capturing an individual's wishes and dreams in a graphic, accessible form. Other examples of inclusive processes and references are provided for your use. One of the most important benefits of an authentic, person-centred plan, is that it celebrates and describes a person's likes, preferences, dislikes, and wishes with respect to their home and other dimensions of their life; all which can assist with identifying potential 'matches' for a shared living arrangement. Some individuals may have begun the process of planning with a CLBC facilitator, and as such a short profile about the person may be available. More often, the agency home share coordinator takes the lead in developing a comprehensive story of the person which they then build on to help find the best shared living match.

PROMOTING QUALITY OF LIFE

CLBC and service providers have been exploring ways to measure individual quality of life as a means of achieving the vision of individuals leading good lives in welcoming communities. CLBC learned of the **Quality of Life (QoL) framework** that was developed and internationally validated by Dr. Robert Schalock. The framework has been adopted by CLBC and now underpins the provision of services and has been incorporated into the Service

Terms and Conditions as the basis for Outcomes in the contracting relationship. This confirms individual quality of life measures as outcomes that both agencies and home sharing providers must work to achieve in their support to individuals.

QoL is represented by eight domains that provide an indication of an individual’s quality of life in three broad areas: independence, social participation, and well-being. While the QoL framework is applicable to all people, regardless of disability, the domains correlate especially well with CLBC’s overall vision of “good lives in welcoming communities”. The table below shows the relationship between the three factors, eight domains, and associated indicators. Personal planning should ensure that these domains are reflected in the plan.

Domain	Exemplary indicators
Independence factor	
Personal development	<ul style="list-style-type: none"> ✓ Education (achievements, education status) ✓ Personal competence (cognitive, social, practical) ✓ Performance (success, achievement, productivity)
Self-determination	<ul style="list-style-type: none"> ✓ Autonomy/personal control ✓ Goals and personal values (desires, expectations) ✓ Choices (opportunities, options, preferences)
Social participation factor	
Interpersonal relations	<ul style="list-style-type: none"> ✓ Interactions (social networks, social contacts) ✓ Relationships (family, friends, peers) ✓ Supports (emotional, physical, financial) ✓ Recreation
Social inclusion	<ul style="list-style-type: none"> ✓ Community integration and participation ✓ Community roles (contributor, volunteer) ✓ Social supports (support networks, services)
Rights	<ul style="list-style-type: none"> ✓ Human (respect, dignity, equality) ✓ Legal (citizenship, access, due process)
Well-being factor	
Emotional well-being	<ul style="list-style-type: none"> ✓ Contentment (satisfaction, moods, enjoyment) ✓ Self-concept (identity, self-worth, self-esteem) ✓ Lack of stress (predictability and control)
Physical well-being	<ul style="list-style-type: none"> ✓ Health (functioning, symptoms, fitness, nutrition) ✓ Activities of daily living (self-care, mobility) ✓ Physical activities including recreation
Material well-being	<ul style="list-style-type: none"> ✓ Financial status (income, benefits) ✓ Employment (work status, work environment) ✓ Housing (type of residence, ownership)

As one means of evaluating personal outcomes for individuals receiving service, CLBC has introduced a survey process (known as ***include Me!***) in which individuals who access CLBC-funded services are asked to provide information about their quality of life. The survey and the implementation process have been designed to ensure that the voices of individuals with developmental disabilities are truly heard.

Unlike many surveys that are used within social service sectors, this survey does not ask about service quality or service satisfaction. Instead, it asks individuals about their quality of life from their own perspective. The survey is relevant whether services are a large part of an individual's life or a small part of an individual's life. The questions asked, and the ensuing conversations, are more holistic than those we have often had with individuals and with one another in the past. Many service providers offering shared living are using the information from include Me! to assist with their review of outcomes for those they serve.

PROMOTING SELF DETERMINATION

An authentic, person-centred plan is pivotal to honouring voice and choice for people with developmental disabilities. Thus, both at an agency level and with each shared living provider, the power and importance of person-centred planning must be enshrined as a commitment which is upheld and reaffirmed. This same expectation is held for any home share providers remaining under direct contracts with CLBC.

In order for individuals with developmental disabilities to be as fully involved in their planning process as possible, a concurrent responsibility on the part of an agency, should be the promotion and development of self-advocacy skills among the cohort of individuals they support. The ability and opportunity to express preferences, likes and dislikes are hallmarks of self-determination and an outcome of developing confidence in advocating for oneself. In order for individuals with developmental disabilities to meaningfully contribute to their personal plans, they must be supported to build their knowledge about their individual rights, responsibilities, and expectations of the service they receive. As well, individuals must be supported to exercise their voice and their choices.

A consistent practice of successful agencies is the production and distribution of a comprehensive, plain language ***Individual Handbook*** which helps outline these key topics involving individual self-determination, as well as providing information on shared living, the process for finding and selecting a home, transitions, planning processes, and expectations of the relationship. As well, hosting self advocacy groups is another important strategy for building confidence in expressing choices and preferences, as well as learning how to voice concerns and complaints about their experiences with supports.

Agencies who actively support the concept of self advocacy are now meeting a growing group of young men and women who may or may not choose to describe themselves as self advocates, or are adopting the term 'diversabilities' to describe themselves. Others may not choose to actively self identify as advocating at all. Regardless of the terminology, what is vitally important is that however the person communicates their wishes and their choices, their voice is heard and reflected in the planning process.



THE FOUNDATION FOR SUCCESS: ORGANIZATIONAL ATTRIBUTES & CAPACITY

Innovation and creativity are most often associated with an agency style which emphasizes individual gifts, strengths, and capacity or, as one organization puts it, “seeing beyond disability to ability”.

Although this resource is focused on shared living, the attributes identified as characteristics of successful, quality driven agencies are applicable beyond this one option of service to individuals with disabilities. Moreover, they also correspond to many of the standards associated with meeting accreditation requirements.

VALUES INFORM LEADERSHIP

A key element of success is the presence of an authentic, values-based culture, reflected not only by those in key leadership roles within the agency, but demonstrated throughout by all employees and volunteers. Successful agencies 'live' their values through responsible advocacy with and for those they serve, practicing ethical conduct as a hallmark of organizational culture, and maintaining congruence between their stated vision and actions. Successful agencies will have undoubtedly established a Code of Ethics and a Bill of Rights for those they serve. These are not merely items on a checklist of compliance, but rather, living documents which inform practice, policy, and the day-to-day interactions between the agency and those it serves, as well as the relationships between those who work for or volunteer with the agency.

PEOPLE COME FIRST

The person is at the heart of the planning process and a commitment to person-centred services is evident. In addition, the participation of family (natural or acquired) and members of the individual's personal support network is deeply valued and meaningfully incorporated into all aspects of the agency's culture and practices. Self-advocacy initiatives are prioritized, individuals are supported to learn about their rights and responsibilities, and actively encouraged to practice these skills. Resources to support meaningful contribution by people with disabilities have been thoughtfully prepared and are presented in a variety of formats to enhance accessibility and usefulness. The voices of those the agency serves are authentically reflected in the services they access.

COMMUNITY ROOTS

Successful agencies demonstrate a genuine and sustained community presence. They seek to intentionally build and uphold organizational competencies that support the development and maintenance of deep roots in community. These roots form the fertile

ground from which to build networks of support for those they serve, recruit and retain allies, and continuously promote the values of citizenship and contribution on behalf of individuals with developmental disabilities. Successful agencies are clear that the goals of citizenship for those they serve can only be achieved if the organization, as an entity, regularly and genuinely seeks opportunities to provide leadership and contribution to the communities they reside in. In short, successful agencies are truly **of** the community, not merely located **in** them.

RELATIONSHIPS ARE A PRIORITY

A commitment to the value of strong relationships is evident both in promoting and sustaining personal support networks for individuals and families, as well as building capacity and connection with shared living providers. A clear understanding of and commitment to promoting safeguards, both formal and informal, is reflected in the personal support network building strategies evident throughout all supports and services provided under the aegis of the agency.

The commitment to the value and importance of relationships is also demonstrated in an intentional and focused promotion of individual and family participation that is deeply valued and authentically incorporated into all aspects of the agency's culture and practices. As well, there is evidence of strong and successful relationships with other community based, service providing organizations, community resources, federated bodies, CLBC, businesses, and others. This focus on relationships is an essential feature of successful agencies; thereby yielding a dynamic, authentic, community presence.

A COMMITMENT TO EXCELLENCE

Successful agencies demonstrate a commitment to excellence in their services and conduct; they desire to exceed standards, not merely meet them. In addition, and if relevant, they have achieved successful, sustained accreditation status and have developed comprehensive, continuous quality improvement processes which are imbedded and integrated throughout the agency. Accountability is a promise renewed each day.

INNOVATION AND CREATIVITY

Building capacity requires a commitment to growth and innovation through seeking opportunities to expand knowledge, and engage with new ideas and ways of working. Innovation, creativity, and regularly welcoming suggestions for change are hallmarks of a successful, evolving agency. In addition, innovation and creativity are most often associated with an agency style which emphasizes individual gifts, strengths, and capacity or, as one organization puts it, “seeing beyond disability to ability”.

PROMOTING SUCCESS

“Happiness doesn't lie in conspicuous consumption and the relentless amassing of useless crap. Happiness lies in the person sitting beside you and your ability to talk to them. Happiness is clear-headed human interaction and empathy. Happiness is home. And home is not a house - home is a mythological conceit. It is a state of mind. A place of communion and unconditional love. It is where, when you cross its threshold, you finally feel at peace.”

- Dennis Lehane

If our vision of shared living is the creation of a truly shared life, characterized by mutuality and the stability of a real home, it is important to pay attention to the essential building blocks of the process which will promote a successful and sustained relationship for those involved. The stages outlined below are recommended based on the extensive experience of agencies that have been successful in supporting shared living. Attention to these stages represents what are considered optimal conditions for honouring the process of building a relationship. It cannot be emphasized enough that the experience of successful agencies has confirmed for them that shared living settings cannot and must not be 'fast tracked' or utilized a crisis response strategy.

STAGES IN THE JOURNEY

Recruitment Strategies

In order to build responsiveness and sustain capacity to support shared living arrangements, most successful service providers have found that the means by which they recruit potential shared living providers from the community is a critical element in ensuring positive outcomes. Further, in order to provide choice for individuals with developmental disabilities with respect to fulfilling their wish list for a home, it is best if opportunity to exercise that choice is met by maintaining an array of qualified shared living providers. Recruitment is generally a continuous process; most effectively achieved when the agency has deep roots in the community and an authentic presence from which to build the right relationships for shared living.

Recruitment strategies need to be varied and reflect what is most successful for the community or region an agency delivers service in. Some of the strategies that have proven successful include: advertising in local papers, word-of-mouth promotion between existing shared living providers, connecting with colleges that deliver Community Support Worker programs and/or connecting with university students, utilizing the networks of family members and individuals, and providing presentations at community information events. Agencies that successfully commit to community outreach as part of their capacity building activities often create and distribute an agency newsletter. This publication can be an effective way to profile the topic of shared living, feature success stories, and invite potential providers to learn more about this opportunity.

Another effective strategy that many agencies use to recruit potential providers, and assess and develop their confidence and capacity, is to begin a relationship by having them provide respite as an entry point into shared living. This helps sustain the existing circle of

shared living providers who need qualified respite, and provides a graduated introduction for new people.

It is generally agreed, amongst the network of successful agencies, that it is not wise or appropriate to contract with existing employees to provide shared living. Contracting within the cadre of agency employees has the potential to create a conflict of interest that could easily compromise honouring the best interests of the individual living in the home.

Completing a Home Study

The growth in shared living as a residential option has created unique opportunities for community members, who may not be part of the community living sector, to experience the privilege of building relationships with individuals with developmental disabilities. Although typically shared living is not generally the entry into relationships with individuals with disabilities, there are times when it could be. Therefore, our responsibility to those we support requires that due diligence be exercised in determining the motivation and suitability of some of the inquiries that may be received. As well, supporting a successful shared living relationship relies on a thorough and thoughtful process to ensure key aspects of suitability and capacity are confirmed in order to safeguard the principles and values of this type of living arrangement.

In conjunction with the Justice Institute of BC, CLBC has developed a for-credit, home study certification course that combines online modules with a full day of in-person training. CLBC recommends that anyone completing home studies takes this course as a means of demonstrating capacity for undertaking the coordination of home sharing arrangements. The course includes an overview of the history of the community living movement, the changes in services and supports over the past several decades, and principles which underpin shared living. It also incorporates guidance and experiential learning around each element of an 8 step, home study process. The steps which have been defined and are reviewed in the course modules are:

- ❖ **Step 1:** Pre-screening: Initial contact with a potential shared living provider helps determine if they are a suitable candidate for continuing with a home study;
- ❖ **Step 2:** Information gathering: opportunity to collect critical information that confirms suitability and begins to build a portrait of the candidate;
- ❖ **Step 3:** Review information: essential to assessing the capacity of the candidate and determining where additional information may be required or requested;

- ❖ **Step 4:** Interviews: planned and conducted to develop a more complete picture of the candidate, their family and their home;
- ❖ **Step 5:** Analysis: an important opportunity to review and confirm aspects of the information which has been collected;
- ❖ **Step 6:** Follow-up: provides an opportunity to address any additional information needs and complete the Health and Safety checklist;
- ❖ **Step 7:** Evaluation: review the completed home study package to determine the candidate's suitability for approval as a home sharing provider;
- ❖ **Step 8:** Recommendation Summary: create a written summary of the rationale for a final recommendation regarding candidate suitability and if they have been approved or rejected as a shared living provider.

Step 1: Pre-Screening ~ Assessing Interest and Capacity

Assessing and confirming the authenticity of inquiries from the community is supported by conducting an initial telephone interview which can help answer questions and potentially rule out unsuitable applicants. While home sharing is most often an extremely rewarding experience, it is important to alert potential candidates to the reality that there could be challenges. Most agencies who provide shared living services and those who live in shared settings, confirm that it must be more than a job - it is a lifestyle choice and must be thoughtfully considered. As well, in order to support stability in the shared living arrangement, it is important to endeavour to assess the commitment of the person making the inquiry e.g. will they be able to support the person as they age or if their support needs change?

Advising a potential provider of a checklist of basic requirements to confirm their eligibility can assist with this initial assessment of interest and capacity:

- ❖ Previous experience with individuals with developmental disabilities;
- ❖ Minimum of 19 years of age;
- ❖ Satisfactory criminal record check for everyone over 18 in the household and completed home study;

- ❖ Satisfactory background check;
- ❖ First Aid and CPR certification;
- ❖ Physician's certification of good health;
- ❖ Valid driver's licence and presentation of driver's abstract;
- ❖ Willingness to understand and promote the vision, mission, and values of the contracting agency and the responsibilities associated with CLBC's Home Sharing Standards;
- ❖ Ability to provide a safe and welcoming home that offers the individual opportunities for community participation, emphasizes person centred support, and actively supports inclusion;
- ❖ Clear capacity to be available and responsive to the needs and support requirements of the individual.

A candidate's motivations and responses to these preliminary information pieces will help determine the appropriateness of forwarding a more comprehensive package to continue the process. Further, it is recommended that potential shared living providers understand that the approval and screening process will be comprehensive **and** will involve all members of their household. It is also important to emphasize that the approval and screening process does not automatically guarantee a contract for service will be drawn up; there are many contributing factors especially the choice of the person served.

Step 2: Information Gathering ~ Application Process

An agency acts as proxy on behalf of the individual and their family in the earliest stages of recruiting potential shared living candidates. Fulfilling these responsibilities thus requires a high level of diligence on the part of an agency in order to confirm suitability. It is because of this that successful practice is guided by an unwavering commitment to person-centred planning. The responsibility to represent the interests of the individual in these early stages relies on knowing the person well, and orienting them fully to the steps in the process e.g. letting them know that it may take time to find the right life sharing situation and how they can participate in the process. It should be noted that recruitment of potential shared living candidates may also occur without having a particular individual in mind. The suitability of a

candidate in those instances will be assessed with respect to their appreciation for the values and principles associated with community living and their willingness to uphold and safeguard an individual's rights.

Once an initial screening conversation has occurred, an application package can be given to a potential shared living provider. This application package should be sufficiently comprehensive to provide both the agency and the applicant with clear expectations of the values and responsibilities inherent to the role. It should be noted that these screening activities must also be applied to potential shared living providers who are referred by an individual or family member. While respecting the wishes and initiative inherent in these referrals, the agency must confirm that their due diligence has been met and that all the elements of their regular screening process have occurred.

A formal application form should request information regarding the following:

- ❖ Name, address, contact information;
- ❖ Education and experience in supporting individuals with developmental disabilities;
- ❖ Employment background: past and current;
- ❖ Information regarding family and household members who will be living in the home;
- ❖ Assessment of the level of support the potential candidate can provide
- ❖ Lifestyle e.g. active, outdoors, rural home;
- ❖ Details regarding location and style of the home, transportation options available, and proximity to community services;
- ❖ Access to a computer and familiarity with reporting responsibilities;
- ❖ References: both employment based and personal.

The application can also highlight key terms and conditions of being a shared living provider (separate from what a written contract will contain) such as adherence to home sharing standards, and the monitoring and reporting requirements that will be expected. Including this additional information as part of the application may assist some potential

candidates in considering their willingness and ability to meet the requirements associated with the role. CLBC has developed a comprehensive package which is available for organizations to use or adapt to help build their own forms. Agency representatives affiliated with the CEO Network have also provided their templates for reference throughout this resource.

In addition to the completed application, a written submission is also often employed as a part of the screening process. This submission is designed to reflect current principles in supporting adults with developmental disabilities and assesses the candidate's attitudes and knowledge in areas such as:

- ❖ Supporting the right of individuals to exercise choice, participate in planning, and direct their services;
- ❖ Commitment to person-centred planning;
- ❖ Support for and capacity to assist individuals to participate in valued social roles, experience the rights and responsibilities of citizenship, and contribute to community in a personally meaningful way;
- ❖ Respect for religious, cultural, lifestyle affiliations and traditions;
- ❖ Attention to safety and personal care needs;
- ❖ Promotion of opportunities for personal growth and skill development;
- ❖ Capacity and commitment to build and/or sustain the individual's personal support network, including family members;
- ❖ Philosophy and experience in supporting individuals with behavioural challenges with skill and in the least restrictive manner.

Step 3: Reviewing and Confirming Suitability: documentation and protocols

The successful completion of the initial application document should provide sufficient information to signal whether the applicant is demonstrating suitable qualities to proceed to

the next step. Successful practice confirms that an essential safeguard is the explicit understanding that moving forward on any of the steps in the process will not occur unless a previous element has been fully and satisfactorily completed. Although there may be pressure to expedite the development of a shared living situation, the responsibility to individuals with developmental disabilities can only be honoured by going slowly and completing each stage of the process.

In addition to the completed application form, the following documentation is recommended to meet legal and ethical responsibilities associated with the role.

- ❖ Physician's reference form confirming psychological and physical capacity to provide support;
- ❖ Criminal Record Check (renewed at least every five years or more frequently if extenuating circumstances emerge);
- ❖ Copy of driver's licence and clean driver's abstract (renewed every year);
- ❖ Confirmation of First Aid and CPR training and certification;
- ❖ Personal reference form confirming a minimum of 3 successful references from non-relatives.

Step 4: Conducting Interviews

Conducting an informative interview well is a blend of having the right content questions and sufficient experience to ensure the process is effective. The interview can thus provide both a written record of the scope of the conversation's details as well as an opportunity to assess the manner and capacity of the potential shared living provider through their responses. It is important to plan and conduct interviews in the candidate's home ensuring that all other significant individuals who will be actively involved in developing the shared living relationship have been included in the process. The interview process typically takes more than one meeting with a potential provider to complete.

It is very important that the interview be accurately and fully recorded and documentation regarding the responses be retained with other pieces of information collected through the assessment process. The interview, while not the sole determination of suitability, is critical to establishing a sense of the candidate. As well, information gained from interviews with

other family members in the household will help support your assessment and can also offer vital information to share with both the individual and their family members as you are introducing options for their consideration.

Steps 5 – 8: Completing the Home Study

A home study provides a vital window into the day-to-day life of the potential shared living candidate. Ideally, the process offers an opportunity for the applicant to further demonstrate the authenticity of their interest, as well as their capacity to meet the expectations of the relationship. The home study will help confirm aspects of what was discussed during the interviews.

Consistency in the process of conducting home studies assists with ensuring that a comprehensive and complete review occurs. A detailed check list assists with the assessment. A copy of the completed check list also forms part of the record of confirming suitability of the shared living provider and can serve to reinforce both the initial and continuing expectations in the home as well as signalling key values in supportive relationships with individuals with developmental disabilities.

The home study involves a comprehensive, documented analysis of the following areas:

- ❖ Motivation to provide shared living supports;
- ❖ Autobiographical information regarding relationships, family interactions, stress management;
- ❖ Questions regarding lifestyle and regular household routines;
- ❖ The design of the home including accessibility, locations of bedrooms and common spaces;
- ❖ Values;
- ❖ Strategies for supporting community participation;
- ❖ Self care and supports;
- ❖ Respite access;

- ❖ Safeguards;
- ❖ Style and preferences in support relationships e.g. capacity and skill areas;
- ❖ Health and safety considerations through conducting an assessment of the home.

Multiple visits may be required in order to ensure that every member of the family is introduced and interviewed, and that the various cycles of the day's activities are observed. This allows the home share coordinator to gain a fuller appreciation of the typical routines and interactions amongst the members of the household and to manage "interview fatigue" by all the participants in the process. Rushing interviews or omitting questions will compromise the home study and the outcomes intended of the process.

The process of completing a home study and arriving at a recommendation regarding the suitability of a candidate can only be considered when these essential steps have been fully completed.

HONOURING CHOICE FOR INDIVIDUALS

Choice is a fundamental expression of self-determination for individuals with developmental disabilities and a core principle of shared living. Selecting with whom they will live is a fundamental right which must be upheld if the vision and values of shared living are to be genuinely respected by an agency.

The process of listening deeply to individuals, documenting their likes, dislikes, needs, wishes, and dreams is complementary to recruiting potential shared living providers. This process is best facilitated by people who know the person well and are well trusted to ensure that the reactions and feedback provided by the person can be authentically assessed. Offering candidates for consideration by the individual, and their supporters, is similar to any matching process and involves being able to accurately assess what is the best fit for everyone involved.

Providing information about a shared living opportunity must be offered in a manner that will allow the individual to assess the situation and allow sufficient time for them to consider the choices and consult with members of their family and personal support network if they wish advice or support. Service providers under contract to a public body such as CLBC are subject to the same expectations as their funder under the Freedom of Information and Protection of Privacy Act (FOIPPA). Under FOIPPA, a person has the right to access any record under the control of CLBC, including a record containing their personal information.

This right applies to both supported individuals and candidates for shared living. This means an applicant can request the notes and report about themselves as can the individual who is supported.

In order to respect confidentiality responsibilities, it is important that an organization ensure they have secured consent from the person to share any personal profile of them with a potential share living provider. This step should be completed and confirmed via a signed consent form, at the beginning of the process. The consent form is also an important part of the documentation that needs to be maintained with all other documents. Receiving consent from the individual considering a shared living situation, must precede sharing information with a provider and helps role model the organization's expectations with regard to respect, confidentiality, choice, and values for a potential shared living provider.

THE ROLE OF FAMILY

Family members' needs, concerns, and relationship with their son, daughter, or sibling may potentially factor into the process of selecting and confirming a shared living provider. The relationship between the family member(s) and a potential provider must be nourished and maintained - ideally their perspective, history, and involvement as part of the planning and decision making should complement the choices and preferences of the individual.

Family members will typically need to be factored into a thoughtful transition process in order to demonstrate respect for their relationship with their son, daughter, or sibling. If an individual is transitioning from a family home to a home share setting, there may be a crush of emotions associated with the move. Some families may welcome the transition as a natural life progression; for others there may be anxiety, guilt, and grieving associated with the decision. Sensitivity to the transition for everyone is critical.

EARLY DAYS...CULTIVATING THE RELATIONSHIP

Building a successful relationship of any kind takes time and sharing a home typically involves ups and downs. This is true whether the individual you are living with has a developmental disability or not. The transitional period is an important opportunity to begin the process of helping everyone get to know each other and should proceed at the pace comfortable to **both** the individual and the prospective shared living provider.

Planning for success requires taking into consideration about how to best facilitate a transitional process which honours and respects the experience and personalities of all parties. This may be particularly poignant for an individual with a developmental disability who might be experiencing the first major move of their lives if they have lived at home with family or in a group setting for many years. Thus, the process should not be rushed. Facilitating multiple opportunities for meetings between the individual and a potential shared living provider is vital to confirming the suitability of the match. Providing a chance to check in after each visit and assess the experience from both perspectives will help everyone make an informed decision.

Experience has taught us that what typically works best is for the individual and shared living provider to slowly begin to integrate their lives. Some strategies that have proven successful in supporting this developing relationship, and a respectful and intentional transitional period, include:

- ❖ Sharing meals together;
- ❖ Inviting the individual and their family to participate in the shared living provider's family events and community outings;
- ❖ Coordinating attendance at an individual's community activities to gain perspective and knowledge of their relationships and abilities;
- ❖ Creating opportunities for overnight and weekend stays to build confidence and familiarity prior to planning for a full time residency;
- ❖ Facilitating conversations between the individual, their family and/or support network and the shared living provider, to assist with cultivating a circle of connection between them.

The agency should be actively monitoring the success and outcomes of these transitional activities in order to confirm if the match should proceed through conversations with each member of the potential shared living relationship.

The Burnaby Association for Community Inclusion is working to enhance the quality and stability of their shared living situations by actively cultivating the development of **Shared Commitment** documents which describe a process of thoughtful, intentional discussion about the key elements in the relationship including:

- ❖ Hopes and dreams for the relationship;
- ❖ Privacy needs;
- ❖ Resolving conflict;
- ❖ Celebrations;
- ❖ Daily life;
- ❖ Ways to honour and regularly reflect on the commitments;
- ❖ Responding to changes and concerns.

This unique and values-driven process is a helpful model for others. The Burnaby Association for Community Inclusion has made the resource available on their website, along with other shared living resources.

The logistics leading up to and during the transition to a new home involve some specific planning to ensure that the process is thoughtful, efficient, and respects the change that is occurring. Even when happy changes occur in someone's life, there are still adjustments that will need to be made and some stress inherent in the process. Planning together with the individual, their family and supporters, and the shared living provider should include:

- ❖ Thinking about when the person's personal effects, furniture, pets, etc. will be moved in;
- ❖ How the individual's personal space and privacy will be arranged;
- ❖ The logistics of moving day;
- ❖ How the costs of moving will be dealt with;
- ❖ Orientation to the neighbourhood, local amenities, and transportation;
- ❖ Any painting, renovations, or adaptations which need to be performed;

- ❖ Attending to changes in dental and medical services;
- ❖ Moving pharmacies or banking institutions for the individual;
- ❖ Other contingencies to help manage the change and adjustment.

Thinking ahead about these key elements associated with the early days of the shared living relationship can make a huge difference to the success of the relationship. A transition checklist is a helpful document to assist with ensuring that planning is completed.

CONTRACTS AND CONTRACTORS: TAKING CARE OF THE PAPERWORK

A thorough orientation process is vital to confirming the nature of the shared living relationship, agency expectations, and the support requirements of the individual. It is reasonable and responsible to provide resources and information to shared living providers to support their role and responsibilities. Most agencies find that preparing a **Shared Living Guide** with information on the agency, responsibilities, reporting protocols, and sample forms is an efficient and effective way to confirm the details. As well, this can serve as a reference for shared living providers which they can build upon over time. This guide should also include relevant CLBC resources, such as the Standards for Home Sharing, and policies to enhance the knowledge base of the shared living provider about the provincial resources and context for community living services, as well as standards and policies which will guide aspects of the monitoring role of the agency. CLBC's website is an important link to incorporate into agency materials for reference to resources.

A contract for service can only be offered when all of the elements of the process have been confirmed. The contract acts as the legal ratification of the expectations and terms of the relationship and should include information regarding, but not limited to:

- ❖ The person-specific outcomes and services expected;
- ❖ Responsibilities, duties, and obligations of the contractor with respect to WorkSafe BC, household insurance, taxation, confidentiality, and termination;
- ❖ Documentation and reporting expectations;

- ❖ Information regarding conflict resolution;
- ❖ Reference to standards, monitoring, and reporting requirements;
- ❖ Links to agency and CLBC policy applicable to the shared living service;
- ❖ Contacts and resources available to the shared living provider;
- ❖ Accessing respite.

The contractual relationship between agencies and contracted shared living providers has been the subject of an extensive and recent review under the auspices of the CEO Network of BC. This has included working with a lawyer to update a contract template for use by CEO Network agencies to use with home share providers and the completion of a **Handbook for Independent Contractors in Home Share**. This handbook will be a plain language interpretation of some of the articles in the contract, expectations of Home Share providers, and resource materials. The handbook will reference the new contract template.

For agencies who are not affiliated with the CEO Network, it is recommended that agency contracts be thoroughly vetted, employing the benefit of legal advice where applicable, in order to ensure they define and describe the responsibilities of both parties. These documents are critical to assisting with the formal confirmation of the contractual relationship.



SUSTAINING RELATIONSHIPS

“Everybody has a home team: It’s the people you call when you get a flat tire or when something terrible happens. It’s the people who, near or far, know everything that’s wrong with you and love you anyways. These are the ones who tell you their secrets, who get themselves a glass of water without asking when they’re at your house. These are the people who cry when you cry. These are your people, your middle-of-the-night, no-matter-what people.”

- Shauna Niequist, *Bittersweet*

The experience of successful organizations has taught us that a solid beginning in the shared living relationship is nurtured through a commitment to providing intentional support to strengthen and sustain the arrangement.

DEDICATED SHARED LIVING SUPPORT

In recognition of the responsibilities associated with providing agency coordinated shared living arrangements, CLBC has committed to provide funding to support the work of Coordinators. Through negotiations between CLBC and the CEO Network, the current ratio for the role has been established as 1 Coordinator for every 25 individuals. This is not intended as a rigid ratio and some variation on this is allowed depending upon:

- ❖ Whether or not the home sharing network is undergoing growth or remains stable;
- ❖ If the shared living providers are newer or long term and stable;
- ❖ The number of homes with more than one person living in them³;
- ❖ The complexity of the needs of the individuals served in the shared living settings, and;
- ❖ The support needs of the families involved.

The role of the Coordinator is pivotal to building and sustaining a successful partnership between the agency and the shared living provider. Further, providing clarity between the various roles and responsibilities held by the agency, CLBC, community professional supports, and the shared living provider is essential to the success of the partnership and forms part of the complex role facilitated by the Coordinator.

The primary role of the Coordinator is to facilitate due diligence in all aspects of the recruitment of shared living providers, provide ongoing support, and to monitor the satisfaction and quality of life of the individual living in the homes within the agency network. This includes, but is not limited to:

³ Shared living settings are presumed to be planned for 1 person/home. Variations and/or exceptions to this must demonstrate that they honour the best interests of the individual(s) with developmental disabilities involved.

- ❖ Providing information and referrals to other resources and organizations;
- ❖ Assisting shared living providers to access community resources on behalf of themselves and the individual who lives with them;
- ❖ Supporting and coordinating providers to develop and facilitate the outcomes of individuals' personal plans;
- ❖ Monitoring the quality of support provided to individuals in the shared living settings;
- ❖ Conducting formal reviews of each shared living arrangement at least once per year, or more frequently depending upon the circumstances of the individual, their support needs, and risk assessments which may indicate an enhanced monitoring role is required;
- ❖ Responding to complaints and incidents which may occur; performing a mediating role as required;
- ❖ Clarifying issues associated with reporting requirements and support needs;
- ❖ Linking shared living providers to opportunities for professional development;
- ❖ Assisting with access to respite;
- ❖ Providing support and assistance with crisis response and emergencies as needed;
- ❖ Supporting family members and individuals as required, including regular contact to receive feedback on the shared living setting;
- ❖ Supporting and coordinating the development of networks of support and information exchange for home share providers;
- ❖ Providing mentoring to support capacity building on the part of shared living providers, including coordinating training opportunities;
- ❖ Applying a safeguarding lens to planning, monitoring, and supporting the well-being of individuals with developmental disabilities living in shared living settings.

Successfully fulfilling these various duties requires a sophisticated blend of experience in the community living field, and a demonstrable commitment to person centred planning and the vision of shared living. The job description is a comprehensive one and agencies need to recruit carefully for this position. Over and above the formal description of the role, Coordinators who were polled were consistent in identifying key attributes they also believe assist with achieving success in their role. These included:

- ❖ Curiosity and inquisitiveness: specifically the ability to explore motivations and learn about prospective shared living providers;
- ❖ Perceptiveness: keen observational skills, especially noticing their 'gut' responses;
- ❖ Flexibility and responsivity: the job is rarely limited to standard hours of work;
- ❖ Excellent communication skills in order to manage sensitive and potentially 'difficult' conversations' occasionally involving conflict resolution;
- ❖ Experience with conducting successful informational interviews;
- ❖ Extensive experience in the community living field across a variety of roles; post secondary education (e.g. social work, administration, etc.) is strongly recommended;
- ❖ Maturity and strong self care skills;
- ❖ Awareness of and respect for cultural, ethnic, and lifestyle diversity;
- ❖ Administrative capacity including exceptional organizational skills;
- ❖ Complex case management skills and competency in attending to the relational dimensions of the working partnership between the agency and provider.

PROMOTING EXCELLENCE AND BUILDING CAPACITY

Successful agencies providing support to individuals with developmental disabilities consistently commit to enhancing the professional development of their employee group. Similarly, shared living providers, while not agency employees, benefit from and often need opportunities to augment their skills and abilities and may not be in a position to access opportunities without the support and leadership of an agency. A comprehensive training schedule, available to these providers at a nominal cost, is essential to supporting them to meet the expectations associated with their contracts and the values and vision of community living. At a minimum, specific training should be accessible in the following areas:

- ❖ Documentation and reporting;
- ❖ Respectful behavioural support methods;
- ❖ Medication administration;
- ❖ Abuse, neglect, and self neglect;
- ❖ CPR and First Aid;
- ❖ Specialized information regarding specific disabilities such as ASD, FASD, etc.;
- ❖ Personal support networking;
- ❖ Informal safeguards and community connections;
- ❖ Care for the 'caregiver': techniques for self care and finding balance in the shared living relationship;
- ❖ Sexuality and personal safety;
- ❖ Mental health and co-occurring disorders.

Providing access to these types of training events can also support networking among shared living providers which can help build peer connections and opportunities for respite. To reduce the onus on any one agency to host multiple training events, it is often helpful for agencies to partner with one another if possible thereby promoting the 'common good' and community capacity needed to support shared living. Similarly, outreach to shared living providers creates the potential for enhancing their sense of community and affiliation with their agency coordinators as well as the larger network of other shared living providers in their area. Newsletters and invitations to social events hosted by the agency will also help build a stronger relationship with shared living providers and provide specific opportunities to support the individuals who live with them to participate in welcoming, community based experiences.

MONITORING

A successful working partnership between an agency and a shared living provider incorporates the expectation and provision of effective, developmental monitoring practices. These correspond to the expectations held by CLBC regarding health and safety, personal planning, and service delivery reporting. CLBC has generated some monitoring checklists which many agencies have customized for their organizations.

Ideally, monitoring represents a collaborative dialogue between the agency coordinator and the shared living provider as part of a working partnership in support of excellence. As such, compliance with the expectations of the contract should only be regarded as the achievement of minimum performance expectations.

Agencies with successful experience in shared living have learned that monitoring visits should be more frequent in the early stages of the relationship, diminishing proportionately as experience grows and success and confidence is noted. However, even as success and experience develop, and the frequency of in-home visits is reduced, the oversight of coordinators must be sustained. Experience indicates that agencies are wise to require quarterly written reports from providers, and should visit the homes, in-person, at least quarterly. CLBC's Quality of Life reports can provide a suitable template for reporting. Many agencies have developed their own versions.

Regularly communicating with the individual, as well as their family and members of their personal support network, is also an essential informal aspect of the monitoring role. Agencies who are accredited hold an expectation that they will conduct surveys of persons served, family members, contractors, and employees on an annual basis to receive feedback and recommendations for improvements. However, while these surveys are a valuable part

of a robust quality assurance system, they do not and cannot replace the conversations that should occur regularly with individuals and their family members and friends, to ensure a deep understanding of the experience of the person in shared living setting. In addition, if there are changes in the household (location, members, or circumstances), it is wise to redo sections of the home study to confirm that the home continues to offer appropriate supports. This renewal of documentation assists with the monitoring process and augments the on-going conversations that provide a safeguard and check-in for everyone.

Monitoring is further buttressed when both the coordinating agency and the individuals with developmental disabilities have deep roots in their community. Experience has taught us that a rich set of connections and authentic community presence, act as natural, informal safeguards for people. Personal support networks also provide an essential safeguard for individuals, providing informal monitoring that can complement that provided more formally by the organization.

The responsibilities associated with monitoring are best documented through the development and maintenance of comprehensive, current records on shared living providers and the individuals they are serving. Most agencies find that either an electronic or paper 'binder' system works best to store the 'story' of the relationship they have built and are maintaining with the provider. Similarly, holding the story of the individual, over time, is vital to providing effective and responsible monitoring as well as advocacy when the need arises. It is recommended that this documentation, while obviously linked, be kept separate as the relationship with either the shared living provider and/or the individual may continue through changes and over time.

RESPITE

The role of a shared living provider offers significant rewards; it can also be a demanding one and can bring unexpected stresses into a household as everyday routines and responsibilities change when a new household member is welcomed into the home. It is critical that shared living providers understand the benefit of finding balance in their lives and access respite on a regular basis to sustain the relationship. Similarly, individuals with developmental disabilities are interested in and benefit from the break that respite provides, and the opportunities for an expanded circle of support and friendship that can develop through new relationships.

Most shared living contracts include funds to purchase respite support for two days per month. This funding can be used in a manner that best suits the unique circumstances of the shared living situation. It can however, be challenging to find qualified, available respite

providers. As a consequence, agencies often assist with recruiting respite providers alongside potential shared living providers and offer this resource to their provider group in order to sustain and stabilize the settings.

Although securing and confirming suitable respite is considered the responsibility of the shared living provider, the agency cannot abdicate their responsibility for ensuring that anyone contracted to provide support to an individual with a developmental disability, is properly screened and trained. The shared living provider is responsible for ensuring that they complete their due diligence including criminal record checks, background references, and that respite providers be a minimum of 19 years of age. Respite providers must also have appropriate training and experience relevant to the needs and circumstances of the individual they will be supporting. Documentation associated with having performed the requisite checks and references should be maintained by the shared living provider and a copy held by the coordinating agency for their records. Confirmation that this responsibility has been met should be incorporated into the contractual relationship with between the agency and the shared living provider and reviewed annually.



SAFEGUARDING HOME

“Home is where somebody notices when you are no longer there.”

- Aleksandar Hemon, The Lazarus Project

THE NATURE OF SAFEGUARDS

While it is true that everyone is vulnerable at times, the fact remains that individuals with developmental disabilities may experience more vulnerability than other people. They face bigger risks of being harmed and exploited, and often have limited supports and friendships to draw upon to address these issues and/or prevent them.

Safeguards are deliberate actions to help reduce the risks a person might face because of their vulnerabilities. Safeguards assist with helping people manage their vulnerability themselves. They can help protect things that are good in people's lives and can also help prevent or reduce the impact of things that are potentially unsafe or harmful. Intentional safeguards are those interventions, practices, and activities that are specifically and purposively promoted to reduce people's vulnerability. There are different aspects to intentional safeguards, including:

- ❖ **Community safeguards** are for everyone in a vulnerable group or community;
- ❖ **Personal safeguards** are specific to one individual or family;
- ❖ **Formal safeguards** result from laws or policies;
- ❖ **Informal safeguards** are based on caring connections between people.

More often than not, these types of safeguards intersect with one another. All of us benefit from a mix of all four types of safeguards in our lives. Those involved in the lives of people with developmental disabilities, including shared living providers and the coordinating agency, should make a point of actively working to understand, respect, promote, and monitor the different types of safeguards.

In particular, rich, personal support networks are a vital method for ensuring the well being of individuals in shared living situations. Successful agencies know that the deeper the circle of interest and concern; the stronger the safety net around a person. Shared living providers thus must understand that they have a responsibility to assist with the development and maintenance of an individual's network of friends and family. However, this is often a new concept for shared living providers and will require the support and assistance of the supporting agency to ensure this occurs.

CLBC has developed a comprehensive array of resources on the topic of safeguards. They provide information on personal support networks and the role of safeguards in responding to vulnerability and with respect to planning. Key resources within this collection have been redeveloped specifically for use by individuals with developmental disabilities. Plain language and graphics have been incorporated to enhance their usability. All of the resources can be found on CLBC's website and at CLBC offices and should be available to all home share providers in an agency's network.

HOLISTIC SUPPORT: SAFEGUARDING HEALTH AND WELL-BEING

Promoting and maintaining the commitment to person-centred service and a shared living arrangement, should necessarily include thinking about any anticipated crisis response protocols that will support the individual in the event of a breakdown in their mental or physical well-being. Planning ahead reduces the stress on everyone and acts as a responsible safeguard for the individual's wellbeing.

Every person should have a clearly articulated person-centred plan as outlined in the Standards for Home Sharing. This builds upon the initial individual support plan that is developed in partnership with CLBC and the planning individuals do with service providers. The person centred plan is designed to improve the individual's quality of life in areas that person considers to be important. The plan must be tailored to reflect the unique preferences and support requirements of each individual.

A person-centred plan typically includes things that are important to the person (quality of life outcomes) and things that are important for the person such as:

- ❖ Emergency contacts;
- ❖ A description of the person including likes, dislikes, strengths, abilities, important issues, triggers for behaviours, potential challenges;
- ❖ Description of potential risks they may face e.g. wandering, hospital protocols;
- ❖ Personal Assistance Guidelines in the relevant aspects of their support;
- ❖ Information about their support network;

- ❖ Personal care and health needs including diet, favourite foods, sleeping habits, medications, routines, therapies, medical and specialist appointments, allergies;
- ❖ Communication needs and supports including preferred learning styles and successful teaching strategies;
- ❖ Community resources they access, preferred activities they enjoy, and support requirements to ensure success;
- ❖ Information regarding end of life considerations as relevant to the person and their circumstances as well as information about their legal status including Representation Agreements that may be in place.

The person-centred plan will assist with support to the individual and monitoring by the agency. CLBC has a **Bathing Guidelines Policy** jointly developed with the Ministry of Health. This policy provides guidelines with respect to ensuring that any bathing practices reflect the need to respect an individual's wishes for privacy while also addressing potential risks. Similarly, if an individual has complex care needs, Health Services for Community Living or Home and Community Care staff, can provide support in the development of an individualized health care plan which addresses immediate issues and anticipates future concerns. The expectations around healthcare planning for individuals with significant acute or chronic health care conditions are outlined in the Standards for Home Sharing. CLBC, in partnership with the service provider community and the Ministry of Health, has also developed Personal Assistance Guidelines. These are outlined in a helpful resource titled **Thriving in Community** available on CLBC's website.

The Home Share Standards also provide clarity regarding the expectation for transition planning when individuals are facing significant life changes such as moving to a new home. Intentional planning and preparing to support individuals in such situations provides continuity for the person in what can be times of great stress.

Shared living providers must understand their responsibility to conform to the expectations of CLBC standards and policies as part of their contracted service relationship with coordinating agencies. Similarly, agencies and their shared living coordinators must be conversant with the CLBC contractual obligations and expectations of service and able to support shared living providers in developing individualized protocols and perform follow up monitoring. It is important that an organization be aware of the various policies that pertain to the standards, planning responsibilities, and reporting requirements associated with personal care. These are outlined in the Service Terms and Conditions and can be

found on the CLBC website. It is advisable that they are also retained by the organization and copies provided, as relevant, to the shared living provider for their reference.

It is particularly essential that shared living providers also have a comprehensive understanding and respect for the values inherent to positive behaviour and safety planning. Thus, the match between an individual and a shared living provider is critical in ensuring that complex or challenging behaviours a person may experience are well attended to. Shared living providers must clearly understand expectations regarding their interactions with individuals and that they must offer support in respectful and valuing ways that honour the rights, dignity, and safety of the person. Further, they must be familiar with and follow the CLBC **Behaviour Support and Safety Planning: A Guide for Service Providers**. This resource outlines the need for a safety plan that provides more detail and best practice guidelines on the fulfilling the expectations outlines in the policy.

Reinforcing these expectations, along with providing supportive mentoring in assisting individuals in respectful and positive ways, is an important role for the shared living Coordinator. Hosting training events which emphasize positive behavioural support techniques and strategies may also be helpful and support the stability of the shared living arrangement.

CRISES AND EMERGENCIES

Even the best planning will not prevent or anticipate every situation or eliminate the potential for a crisis or emergency. Thus agencies must have the capacity to support the shared living provider in these instances. A critical situation in an individual's life can be challenging for everyone, therefore the coordinating agency should establish their own crisis response procedures which should include the ability to provide temporary placements, respite settings, staff support, and clearly defined communication protocols.

Some agencies have a designated Emergency Response person on staff; others incorporate this role within the shared living Coordinator position. It is the responsibility of the agency to manage and monitor crises and emergencies that occur within shared living settings. Shared living providers must be fully aware of what the expectations and protocols are in the event of an emergency such as:

- ❖ Hospital admission;
- ❖ Police incident;

- ❖ Allegations of abuse, neglect, or self neglect of an individual;
- ❖ Emergency situations such as: house fire or accident;
- ❖ Personal crises that may arise in the life of the individual that could lead to the break down of a shared living setting;

Setting out clear direction regarding the responsibilities and process which must be followed in the event of an emergency will assist in supporting the individual respectfully and safely and ensure that the shared living provider is confident and informed about their role.

ABUSE, NEGLECT AND CRITICAL INCIDENTS

CLBC, and their contracted service providers, are held to clear expectations regarding the rights of individuals. The CLBC website provides policy information regarding abuse, neglect and critical incidents which should be available to shared living providers to ensure they understand their reporting responsibilities and the standards expected. Each individual receiving service is entitled to live, work, learn, and participate in everyday activities in safe environments free from abuse or neglect of any kind.

Therefore, each agency must make it explicit to their shared living providers that they are in a working partnership to prevent abuse and/or neglect and to ensure any corrective actions recommended by investigations are implemented. This responsibility is extended to include the requirement to report, document, and participate in investigations of known or suspected abuse and neglect. CLBC policies regarding reporting requirements, definitions of critical incidents, and the protocol for investigations of abuse and neglect are available on their website.

Shared living providers must be informed and instructed about the nature of abuse and neglect, and their reporting responsibilities, as well as the consequences of investigations proving allegations to be true.

Critical incident reporting, investigations, and reviews constitute another formal safeguard designed to help protect the safety, health, well-being and rights of individuals with developmental disabilities. The success of this safeguard is dependent upon a collaborative approach and providing clear expectations to shared living providers regarding their reporting responsibilities. Effective monitoring by shared living Coordinators also assists with ensuring that individuals are safe. Defining the roles and responsibilities of CLBC with

respect to critical incidents will also assist shared living providers in understanding the collective responsibility held with respect to services for individuals with developmental disabilities in shared living arrangements.

COMPLAINTS AND COMPLIMENTS

Effective communication is a hallmark of a successful shared living relationship. Individuals living in shared living settings, their families, and members of their personal support networks must be made aware of the protocols the agency has in place for receiving complaints and concerns. There must not be any interference or inhibition which restricts the ability of anyone to register issues and a clear procedure identified for responding to concerns. Further, this information must be provided to family members and individuals in a form they can understand and access. Successful agencies typically provide this information to family members and individuals in a ***Participant Handbook*** that is specific to the organization they are served by. This resource may also encompass the information that family members and friends of individuals should be provided with regarding services and supports. Some organizations maintain them as separate resources. The agency's complaint policy should also clearly state that individuals and families are always free to contact CLBC if they have concerns about the service but are not comfortable bringing these concerns to the agency.

Similarly, the concerns of shared living providers must be respected and acknowledged. The procedure for receiving and responding to their concerns should be clearly outlined and consistently responsive. As well, resources external to the agency which could be enlisted should be clearly outlined in the ***Shared Living Providers' Guide***. These would include the Service Quality Advocate and CLBC contacts as examples.

A CHANGE IN THE RELATIONSHIP

In the same way that relationships ebb and flow in any of our lives, so too will shared living situations change and sometimes end. Even though the intent is to develop a long term commitment and offer supports to sustain the shared living situation, either party may wish or need a change. This could happen because the situation has not worked out, or the individual wishes to move to another community, or needs a different kind of support. Changes in an individual's health or mobility may also signal the need for a change in their home. An effective monitoring relationship will help identify changing needs and the

agency needs to be alert and proactive with respect to facilitating transitions when they need to occur.

The terms of the contract between the coordinating agency and the shared living provider must include some direction regarding notice and termination which should be clearly written and confirmed for understanding. Beyond those legal responsibilities, responding to a desire for a change or to move on from a shared living arrangement will also need guidelines to ensure a thoughtful and respectful experience occurs for everyone.

Agencies that have been successful in supporting shared living over time have learned that planning for, and supporting the transition to a new living arrangement, is an important responsibility. These agencies work to prepare a detailed exit summary about the person which documents their experience, progress, and successes. This summary is shared with the new shared living provider or agency to support the transition both in writing and often through conversations with all the stakeholders. These agencies often also remain available for consultative support through the transition period to safeguard the new situation for everyone.

Evaluating the experience for the individual and their support network, as well as the shared living provider, provides opportunities for learning on all counts and contributes to the quality assurance initiatives within the organization. Wherever possible, hosting a conversation to receive feedback from all parties will contribute to a successful transition process for everyone.

HELPFUL RESOURCES

The following is a list of helpful resources which will augment the resources in this Guide as well as provide information on other organizations and services which may be relevant to shared living specifically and services to individuals with developmental disabilities more generally.

Burnaby Association for Community Inclusion at www.gobaci.com

Community Living BC at www.communitylivingbc.ca

NIDUS Personal Planning and Resource Centre at www.nidus.ca

Planned Lifetime Advocacy Network at www.plan.ca

Inclusion BC at www.inclusionbc.org

Family Support Institute at www.familysupportbc.com

Office of the Public Guardian and Trustee at www.trustee.bc.ca

Service Quality Advocate at www.sdsi.gov.bc.ca/advocate/index.htm

CEO Network at www.bcceonetwork.ca