

## **Key Factor 1: Person-Centered Assessment and Discovery**

### **1a) People feel welcome and heard.**

- Staff pay attention to the person.
- Staff listen to the person and gain an understanding of what the person has been through in their past, what the person wants their life to be like, and what services they want and don't want.
- Staff demonstrate respect for the person by listening and responding.
- Staff focus on the person over everyone else in the room.

### **1b) People have authority to plan and pursue their own vision.**

- The person is supported to think about what they would like their life to be like, where they would like to be in the future, and to decide what staff need to do to help them be successful.
- Staff discover what is most important to the person and what will make a positive difference to this person now, and for the future.
- Staff find out what the person really likes to do and what they do best.
- Staff empower the person to express and share their interests, hopes, dreams, worries and fears.

### **1c) Assessment of needs is fair and accurate.**

- The information that staff collect about the person is correct.
- Staff check with the person to make sure information is correct and that the person knows what information staff is keeping about them.
- When staff is not sure what a person really wants, they continue to find ways to learn.
- The assessment process identifies strengths, capabilities and needs.
- The person is actively engaged in the assessment and discovery process.

### **1d) Assessment and discovery identify personally defined quality of life.**

- Staff talk and listen to the person, and there is a sharing of information back and forth during the conversation.
- Once staff discovers what the person wants and needs, they inform the person about what funding and service provider options are available.
- Staff also talk to friends, family and others important to the person during the discovery process (if it is ok with the person).

## **Key Factor 2: Person-Centered Planning**

### **2a) Planning is person-centered.**

- Staff support the person to identify the things that are most important to them and to create a vision of how they want their life to be.
- After staff find out what really matters to the person, they bring together all the right people to create a plan to support the person to achieve their dreams and goals.
- Staff support the person as much as needed to plan for and lead their own meeting.
- Staff support the person to choose what supports they want or don't want.
- Each plan is customized. There are no "canned" or "standard" plans.
- Paid and unpaid supports are identified in the plan for each person.
- Staff show the person through their actions that they are excited about creating this plan with the person, and that staff believes in the person.
- Staff help the person to see how inviting friends and family members to the meeting can be helpful.

### **2b) The plan utilizes and includes natural supports and paid supports.**

- The plan includes resources and things to do in the community that all other community members utilize and participate in.
- The plan includes ideas about how to get money to pay for activities and supports.
- The plan has easy to understand steps needed to get to the person's final goal.
- Paid supports are not used to replace natural supports.

### **2c) Informal community resources are used.**

- The plan includes ideas about people and activities that don't cost money that the person might be interested in trying (neighbors, friends, family, co-workers, places of worship, schools/colleges, businesses, libraries, clubs, volunteering, for example).

### **2d) Planning is responsive to changing priorities, opportunities and needs.**

- Person-centered planning is flexible. As the person's needs and desires change, so does their plan.
- When an obstacle to achieving a person's dream or goal occurs, alternative options are explored.
- Short-term supports are available in times of emergency or illness.

### **2e) Planning and funding are connected to outcomes and supports, not programs.**

- Staff find out what the person wants, what funds are available, what unpaid supports are available.
- Staff talk to the person about options and choices that are available.
- The person is not put into a program that is available just because it exists.
- Funds are used to create supports for each person (one person at a time).
- Funds are linked to the person, not the service.

## Key Factor 3: Supports and Services

### 3a) People have authority to direct supports and services.

- People do things during the day that they want to do, and things that are directly related to the goals they have chosen.
- There are no rules in place except for when a person might be unsafe or when there is no money to pay for what they want to do.
- Staff and the person discuss all rules to make sure they make sense.
- If the person doesn't agree, they have an easy way to complain and the complaint is addressed in a timely manner.
- People can say no to any/all suggestions and staff follow-up to make sure the person understands the consequences.
- There are no set times that people have to do things (bathe, eat, watch TV, use the phone, have visitors, leisure activities).
- All behavior support plans are positive and the organization checks to make sure there is information that shows whether the plan is working or not.
- The person helps develop the program, understands it and agrees to it.
- If there are any restrictions, the Human Rights committee has reviewed and the person knows exactly what they need to do to get rights back.

### 3b) Supports are flexible

- Plans are changed as needed (as people change their minds, as they meet their goals, as they age or health status changes, etc.)
- Services and supports are developed around each person.
- Supports can be started and stopped as needed for each person.
- The organization connects people to supports in the community.

### 3c) Support options are accessible

- Staff explain all of the supports that are available to the person.
- If the person is nervous or afraid to do new things, the staff make sure that the person gets support to at least try new things.
- Staff make sure that the person is able to go to the places and activities that they are interested in, and if they need help it is provided.
- The organization works with community members to understand, value and welcome people.

**3d) People manage supports and providers.**

- People are supported to freely choose the provider of services and can change if they want to.
- People have options to choose which staff will work with them.
- People can discontinue a relationship with a staff if they have lost trust or are uncomfortable without fear of something bad happening to them.

**3e) Supports are available in an emergency or a crisis.**

- The organization realizes that people may have crisis situations and emergencies that need immediate attention.
- The organization makes sure that staff discuss these types of situations with each person and that they have input into what will happen to them if one of these things should happen (for example: aging or death of loved one, collapse of a support network, extraordinary medical or behavioral situations).
- The organization finds supports for these types of situations without resorting to institutionalization or long term hospitalizations.
- The organization should have a way of getting additional help from crisis networks, psychiatrists, psychologists, experts in the community that everybody else uses.

**3f) People can identify personal champions.**

- People are supported to have a relationships with someone in their life who cares, has his or her needs at heart and will step in and help if needed.
- Organizations support people to meet possible future champions.
- Organizations support people to be with/talk to/go out with their personal champion.
- Organizations recognize the personal champion and include them as much as possible.

## **Key Factor 4: Community Connection**

**4a) Community membership facilitates personal opportunities, resources and relationships.**

- The organization helps people to meet and stay connected with friends, family, spiritual connections, and romantic relationships.
- The organization helps people to find out what their interests are, and meet other people who have those same interests.
- The organization works with other service providers as well as other community organizations that don't provide services, and helps people get connected with all of those organizations and the people who use them.

**4b) Peer support mentoring is available.**

- People have the opportunity to listen to, share experiences with, offer ideas and to help others.
- People have the opportunity to be contributing members of society.
- The organization researches peer support programs and assists people to develop their own programs.
- The organization has connections with other community organizations which help people to connect with one another, make friends, and advocate for change.
- The organization helps community members, family members and friends understand the importance of providing opportunities for people to advocate on their own behalf, access peer support activities, and engage in political or advocacy efforts if they wish.

**4c) People receive information and training.**

- The organization gives people information, education and training about their own situation, services and supports available, and whether or not they are eligible.
- The organization simplifies things so that people can be involved in: life planning; managing staff; being on committees; helping to develop policies; self-advocacy; and managing finances/ benefits/ program options, etc.
- The organization does not ask more questions about the person than necessary.

## **Key Factor 5: Workforce**

**5a) The workforce is stable and qualified.**

- The staff are able to find out what people need, and get supports in place to meet those needs.
- The organization trains the staff so they know what to do in all situations, and pays the staff fairly, including benefits.
- Staff are trained and understand that they can be flexible when working with people who change their minds about things.
- The organization gives staff opportunities for career growth.
- The organization does everything it can to recruit and hire the best possible staff with the best skills and values.
- The organization finds out about the social activities, interests, and community connections of the person being hired.
- The organization hires staff with different interests and cultures.

**5b) Practices are culturally competent.**

- Staff are trained to try to understand people who may have different ideas and ways of life than they do.
- Staff show respect for people's different beliefs and ideas.
- Staff does not make fun of or judge people, or try to make people believe what staff believes.
- Staff are supported to learn about different cultures of people and assist people to celebrate their cultures and celebrate reaching their goals.

**5c) Personnel have the flexibility and autonomy to support people.**

- Staff are empowered to support people and make decisions.
- Staff are valued members of the organization.
- Organizations provide staff with training in values, ethics, decision making, problem solving and negotiation.

**5d) Support for cultural/organizational change is provided.**

- The organization works to transform old systems of support into person-centered support.
- The organization puts people at the center of all that they do and communicates this through their mission, vision and values.
- The organization gives everyone a chance to have a say about how the organization is doing to make everything more person centered.

**5e) Advocacy efforts promote fair and affordable provider rates and responsive payment systems.**

- The organization is involved in systems-wide policy campaigns to promote fair provider rates and responsive payment systems.
- The organization works with other agencies that provide different kinds of services to different kinds of people (not just all in their own field).
- The organization helps different agencies to get together and make contacts with community leaders in local and state government to collectively advocate for a fair amount of money to provide the services.
- The organization makes sure that people receiving support are included in these advocacy efforts if they want to be.
- The organization reaches out across community networks and lets everyone know that there are long range benefits for community growth and development when organizations are paid fairly for the work that they do.
- The organization makes sure that there is proper documentation about services, supports and outcomes for people to show that the money is being used the way it should be used.

## Key Factor 6: Governance

### 6a) The organization's mission, vision, and values address person-centered supports.

- The Mission Statement clearly talks about the organization's commitment to person-centered supports, and states how the organization is going to make its mission happen.
- Everyone had an opportunity to give input into the mission, vision and values statements.
- Everyone knows the mission, vision and values of the organization.

### 6b) Organizational practices are both person-centered and system-linked.

- The organization provides person-centered support to all people.
- The actions of the organization mirror what it says it stands for in its mission/vision/values.
- Stakeholders are invited to provide feedback about the organization's performance.
- Feedback from stakeholders is used to make changes and improvements.

### 6c) People and families play meaningful roles.

- The organization actively promotes and provides opportunities for people and families to play meaningful leadership roles, including decision making and policy setting boards.
- The organization ensures that people and family members receive support to fully participate in leadership roles.

## Key Factor 7: Quality and Accountability

### 7a) Quality management systems are integrated.

- Systems are in place that integrate data regarding quality of life , quality assurance and quality improvement.
- Quality of life is defined from each person's perspective.
- Quality assurances are tailored to each person's needs.
- Data collected on quality of life and quality assurances drives quality improvement.
- Data is used for organizational learning and planning.

### 7b) Quality of supports is measured.

- Organizations demonstrate a commitment to supporting personal outcomes.
- Organizations demonstrate a commitment to excellence.
- People, families and advocates participate in the evaluation of the quality of services provided by an organization.

**7c) Participants, families and advocates evaluate supports and providers.**

- Organizations invite stakeholders to provide feedback.
- Outcomes are carefully reviewed and use recommendations to make changes in policy and practices.
- Complaint and grievance systems are easy to use, access and understand.
- All complaints and concerns are carefully reviewed and no one is punished for raising a concern.

**7d) The public is kept informed.**

- The organization gives clear and simple reports to the public about what people want and need.
- This information is given about people in a group, not about each individual, so that people's personal information is kept private.
- The organization gives the public information about how it plans on using its budget to support people to get their wants and needs met.
- Information is given on a regular basis so that the public will understand how funds are spent and will want to continue funding the organization.

**7e) Personal Information remains confidential.**

- People's personal information is never shared without the person's permission.

## **Key Factor 8: Emerging Practices in Individual Budgets**

**8a) People control their budget allocations.**

- People have the option to manage their own service budget.
- People have the option of acting as the employer of service workers.
- People are supported to understand their funding, where it comes from and how it can be used.
- People receive education and support about their funding and are supported to manage it to the extent they choose.

**8b) Individual budgets are both fair and ample.**

- Personal budgets are based on assessment.
- People are supported to make decisions about what services they choose.
- The budget is ample enough to purchase needed supports.

**8c) Budget, money and services/supports are portable.**

- Funds are connected to the person, not a specific service or organization.
- People can change providers and take their funding with them.
- People are supported to redirect their funding as needed to facilitate outcome attainment.