

Chapter Five

Planning Supports



What You Will Find:

Developing Transition and
Implementation Plans

Selecting a Home

Environmental Accessibility

Request for Additional Funding

Housing Survey



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The initial process of supported living, described in Chapter Four, sets the stage for a detailed planning process to begin.

In order to assure appropriate supports and services are identified and approved, the following steps must be completed by the supported living coach.

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The Supported Living Coach –

1. Develops a transition plan.
2. Submits transition/implementation plan to WSC no more than 30 days after service authorization (effective) date.
3. Assists with housing selection.
4. Updates Financial Profile no more than 10 days following housing selection.
5. Submits request for additional funding to WSC prior to signing of lease/mortgage documents.
6. Completes Housing Survey and submits it to WSC 10 days following housing selection.

According to the Developmental Services Waiver Services Medicaid Coverage and Limitations handbook, the supported living coach has ninety (90) days from the date of the person's selection of a provider, to assist the individual in locating a home and obtaining the needed supports and services. "Billable" days are the equivalent to the number of days the supported living coach may bill for time in getting to know the individual, completing the necessary paperwork, and supporting him in locating a safe and desirable home. For individuals moving into their first home, it is suggested the entire ninety (90) day period be utilized to allow sufficient time to assure a successful move.

Once the support and cost plans are approved, the supported living coach develops an implementation plan or a transition plan. These plans address the

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supported living goals from the support plan. Part of the transition process is the idea of a formal implementation plan to identify how ongoing supports will be provided. The transition plan and the Functional Community Assessment (FCA) must be finalized by the time the move occurs. Copies of these plans must be maintained in the individual's record.

In situations where a supported living coach initiates services to an individual already living in his own home, the implementation plan must be completed in the first thirty days. The Florida Supported Living Rule (65B-11 F.A.C.) dictates that the implementation plan or transition plan must be implemented no later than thirty calendar days from the service authorization (effective date) for continuation of services. The implementation plan is updated annually, consistent with the support planning process.

During the ninety day period while the individual and his coach are planning and preparing for the move, many requirements must be addressed. The implementation plan or transition plan will be developed, at a minimum, within thirty days of the initiation of supported living services (service authorization/effective) date according to the DS Waiver handbook. However, waiting thirty days to begin services is not a good idea.

The supported living coach should start working with the individual and her circle of support as soon as possible. This approach assures the individual can begin working on her goals at the start of the move. Consistency is important in the learning process, and a lapse can result in the loss of skills already attained.

The purpose for this initial work is to identify potential resources, assist in locating housing and assist the person in making preparations to move into a home of her own. This process is known as transition planning.

Developing a Transition Plan and/or Implementation Plan

A transition plan is completed for individuals who are in the initial phase of seeking homes of their own or moving to new homes. This plan is substituted for the implementation plan. Once the individual has transitioned to his own home, an implementation plan is developed within the next thirty days and submitted to the support coordinator.

Successful transition into supported living requires that everyone involved in the person's circle of support collaborate to make certain there is a shared

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vision, and mutual understanding of the supports needed and that all services are in place prior to the move. The circle must also be committed to focusing efforts on supporting and including the individual in the community. This collaboration begins well in advance of the person's move into his own home or apartment.

It doesn't matter so much how you get organized, just that you stay organized! (Author Unknown)

As with the reference above, good planning is an essential part of supported living services. Transition planning for before the move helps ensure that needed supports and services are in place to promote the person's comfort, health and safety. Planning for during the move (e.g., assuring the individual is accompanied by someone with whom she feels comfortable, her favorite personal items are packed in the car with her, etc.) for persons who may need additional support on the actual day of the move, could make a big difference in the person's comfort and satisfaction. Planning for after the move lays the foundation for a successful transition to life in a different place with new friends, neighbors, and community connections.

Working closely with the support coordinator and the individual's family will help assure that concerns are not overlooked and that small issues do not have big consequences. Changing one's home can have as much impact on the family as on the individual.

Listening to everyone's fears until they are understood and resolved is an important part of supporting persons and their families. Most stated fears (e.g. "People will be mean to him." "How do we teach him to address strangers coming to the door?" etc.) are valid and should be addressed during transition planning.

Supported living coaches are encouraged to actively listen to the members of the circle of support, and address issues and concerns as part of the transition and implementation planning process. Planning Ahead, A Handbook for Parents, Family Members and Guardians of Adults with Disabilities, available from the Florida Developmental Disabilities Council and the District/Region Developmental Disabilities Program is a helpful resource for families and includes a brief section on "Transition."

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Transition Plan or Implementation Plan

In most instances, a transition plan is necessary to guide the transition process. However, in some situations an implementation plan will be the guiding document. How does one determine which type of plan applies? The following may be helpful in assisting with that decision.

A transition plan is completed for individuals who are in the initial phase of seeking homes of their own or moving to new homes. Under these circumstances, this plan is substituted for the implementation plan. Once the individual has transitioned to his own home, an implementation plan is developed.

Transition or Implementation Plan

1. When the individual is **moving from a non-supported living situation**, such as from a group setting or his family's home, and the supported living coach is using the 90 billable days to support the person in locating a home and assuring supports are in place, the development of a **transition plan is necessary and required**.
2. If the individual is **already receiving supported living coaching services** and will not be using the 90 billable days in locating a home (e.g. has chosen a new coach, has chosen to move to a new place, etc.), the supported living coach should **develop an implementation plan within 30 days of the *effective date to support the attainment of the person's goal in the support plan**.
3. **Implementation plans are developed within thirty (30) days after the individual has moved** into her new place. The implementation plans are adjusted as needed through the support plan year.
4. **Implementation plans** for persons using supported living services are **developed at least annually**, consistent with the effective date of the support plan.
5. **Regardless of the type of plan being used, the plan must be submitted to the support coordinator within 30 days from the *effective date.**

* = as indicated on the Service Authorization

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Transition Planning

As mentioned, a transition plan serves as a guide in supporting an individual's move. There is no set format or form to be used. Each plan should be adjusted to meet the individual's needs and desires. At a minimum, transition plans include a listing of items to be accomplished during the transition period and an indication of responsibility for each item. A few examples of items to consider in assuring a successful move include:

Mike

Mike had lived all his life in an institution. Through much persistence by advocates, he obtained a court order to be released from the facility and be allowed to move into his own place. Unfortunately, the court order gave such close time frames that good transition planning was not possible.

Mike moved on a Friday afternoon and left the facility with approximately \$600 in cash that he withdrew from the institution's "bank." On Saturday morning Mike began to enjoy his new-found freedom. He called a taxi and asked the driver to take him on a ride to the nearest beach, 1-1/2 hours away. The taxi driver waited for him as he spent some time walking along the beach and talking with all the pretty girls.

Mike then took a 2-1/2 hour ride to another city, and while there met a gentlemen who needed a bus ticket. Mike was glad to help out. The last trip he took was to return to the institution, visit and "show off" to his old buddies. When he finally returned home, he had exhausted all of his cash. Now in need of money, he made a deal. He sold all of his new furniture to some neighboring college students for \$200. When his supported living coach was finally able to locate him (Sunday afternoon), he was out of money and had no furniture except his television set which he had, in a fit of boredom, taken completely apart. Although things eventually worked out for Mike, everyone involved learned an invaluable lesson about the importance of good transition planning.

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Transition Plans/Guides May Include*:

- Visiting an array of homes in different neighborhoods.
- Assuring needed paperwork is completed in a timely fashion (such as Individual Financial Profile, etc.)
- Setting up needed supports and services (e.g., transportation, pharmacy, etc.)
- Making moving arrangements, etc.,
- Addressing needed emergency and safety issues,
- Obtaining needed household items, etc.

*Note: For persons moving from ICFs or institutions, the WSC is responsible for assuring specific transition guidelines are met.

An example of a Transitional Guide format courtesy of Collier Connections, Inc. follows:

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Collier Connections, Inc. Supported Living Coaching Service TRANSITINAL GUIDE

Name: _____

		Dates	Support Person
1.	Discuss housing needs with regard to transportation, proximity to work, and person's preference, roommates and community accessibility. Begin Functional Community Assessment.		
2.	Visit and compare an array of potential housing and surrounding neighborhoods.		
3.	Make final housing selection		
4.	Complete Individual Financial Profile (IFP) including proposed start-up stipend and/or supported living stipend request, if needed and submit to WSC.		
5.	If housing and IFP is approved, meet with prospective landlord to complete rental application process and pay deposit / application fee.		
6.	Identify target move in date and confirm with landlord.		
7.	Transfer / open bank accounts.		
8.	Develop a list of needed household start up items (or share of total) with approximate cost and shop for these items.		
9.	Prepare start up grocery list.		
10.	Transfer prescriptions to local pharmacy if needed.		
11.	Request any necessary adaptive devices or special equipment.		
12.	Make arrangements for moving / contact local movers.		
13.	Obtain boxes and begin packing.		
14.	Make necessary transportation arrangements from new home, learn new bus routes.		
15.	Finalize moving plans including; schedule time to sign lease / pick up keys and inspect new home, electric hook-up, telephone, cable and water if necessary.		
16.	Change address on State ID / driver's license.		
17.	Move and begin to unpack / get settled. Complete Housing Health and Safety Checklist and distribute to WSC.		
18.	Complete and distribute Change of Address form.		
19.	Grocery shop for start up supplies.		
20.	Review post-move support, learn emergency access numbers.		
21.	Meet new neighbors, become familiar with new neighborhood.		

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Implementation Plan

Implementation plans must be completed within thirty days of the move or finalized by the time the move occurs.

Implementation plans are an integral part of the support planning process and provide a framework for assisting the individual in acquiring the skills, habits and routines she desires. As discussed, in situations where a supported living coach initiates services for an individual already living in his own home, the implementation plan must be completed in the first thirty days following the effective date. These plans are developed with direction from the individual and include specific strategies and supports to meet support plan goals. Learning objectives may also be included in the implementation plan.

The Functional Community Assessment (FCA), discussed in previous chapters, is the basis for identifying the types of instruction and assistance, as well as the intensity of supports identified in the implementation plan. The information obtained from the FCA forms the foundation for the development of the Implementation Plan. This assessment addresses all areas of daily life. It must be completed prior to the move, and updated annually.

The FCA assists the coach in understanding how the person learns, the routines and habits that may be useful when living on one's own, and the types of things which may support the person in being productive, etc. When compared with the person's personal goals, the FCA provides the baseline information needed to direct the person's path toward achievement of these goals identified on the support plan.

Implementation plans are an integral part of the support plan process and provide a framework for assisting the individual in acquiring the skills, habits and routines she desires. The Developmental Services Waiver Services Medicaid Coverage and Limitations handbook defines implementation plans as follows:

Implementation Plan Definition:

"A plan developed with direction from the (individual), which includes information from the current support plan, and other pertinent sources. The specific areas of training and strategies to meet support plan goal(s) for each person will be addressed in the implementation plan. Training objectives appropriate to the programs and services may also be included in the implementation plan."

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As mentioned, the implementation plan is directed by the desires and needs of the individual. The supported living coach ensures the plan is written in a way that supports the person in achieving the life she desires.

The implementation plan provides a clear picture of those things the individual and the supported living coach have agreed to work toward for the coming year. For the coach, the implementation plan serves as an individualized job description regarding the coach's role in the person's life. For the individual, the plan offers a description of how services will be provided in order to meet the goals identified on the support plan.

Copies of the implementation plan, approved by the individual, should be furnished to the individual, guardian and to the waiver support coordinator at the end of the thirty day period.

At a minimum, according to the DS Waiver handbook, the implementation plan includes:

Implementation Plan includes:

1. Name, address and contact information of person served.
2. Goal(s) from the support plan to be addressed.
3. Strategies employed to assist in meeting SP goals.
4. System for data collection and assessing progress in achieving SP goals.
5. Modification of the implementation plan, based on assessment of progress, to assure goal achievement is attained.
6. Frequency of supported living coaching services and the specific areas of support required by the individual to live in his own home.
7. How home, health and community safety needs will be addressed, and supports needed to meet those needs.
8. How natural and generic supports available through family, friends, neighbors, and the community-at-large will be used.

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Implementation Plan, continued

9. Person responsible for providing coaching services.
10. When coaching will be provided.
11. Method for accessing the supported living coaching provider 24 hours a day, 7 days per week for emergency assistance.

The following are **examples** of implementation plan formats courtesy of Habilitative Services of North Florida and Pinellas Care Systems, Inc. of St. Petersburg, Florida.

SUPPORTED LIVING IMPLEMENTATION PLAN

NAME:

PHONE:

ADDRESS:

EFFECTIVE DATE:

SUPPORT COORDINATOR:

SUPPORTED LIVING SPECIALIST:

24-HRS. DAY / 7 DAYS PER WEEK & BACK-UP CONTACT NUMBERS (Check one):

EXPLANATION OF NEED FOR SUPPORTED LIVING COACHING SERVICES:

This explanation can be found in the Individual Cost Guidelines, the Personal Outcome Measures and the Current Situation sections of the individual's support plan. Also refer to the Functional Community Assessment.

GOAL(S) FROM SUPPORT PLAN TO BE ADDRESSED

THE NON-NEGOTIABLES

The things you might as well accept. Those lifestyle choices which are essential to well-being and a reasonable quality of life . . . the core values. Positive non-negotiables are essential for life to be tolerable and pleasant. Negative non-negotiables make life totally unpleasant and intolerable.

INDIVIDUAL PREFERENCES

The things that are important. These make a major contribution to quality of life but are not as critical as the non-negotiables.

STRATEGY FOR ADDRESSING HOME, HEALTH, AND COMMUNITY SAFETY NEEDS	STRATEGY FOR <u>SUPPORTS</u> NEEDED TO ACHIEVE SUPPORT PLAN GOAL(S) (Include frequency and time frames)
<ul style="list-style-type: none"> • Maintain a current medical information sheet. • Encourage and/or facilitate the completion of an annual physical and dental examination. • Review seasonal precautions such as severe weather preparedness, proper dress, adequate heating, hypothermia, heat exhaustion/stroke, dehydration, etc. • Assist with equipping home with first aid kit, fire extinguisher, smoke detector, and disaster kit and review their use quarterly. • Work with local emergency management organizations as needed to ensure safe evacuation during natural and/or chemical disasters. • Complete a quarterly health and safety review and housing survey (on the Quarterly Meeting Worksheet). Any concerns will be addressed, and ongoing concerns will be reported to the Department. • Additional training and support needed: 	

STRATEGY FOR TRAINING NEEDED TO ACHIEVE SUPPORT PLAN GOAL(S)

TRAINING GOAL #

Frequency of Training _____

Targeted Completion Date _____

Methodology Be Used: Modeling Physical Assistance Role Playing
 Videos Visualization Verbal Prompting Problem Solving
 Incidental Learning Consultation Details / Process to be used:

PROGRESS NOTED/ ADJUSTMENTS MADE (REVIEW DATE)	PROGRESS NOTED/ ADJUSTMENTS MADE (REVIEW DATE)	PROGRESS NOTED/ ADJUSTMENTS MADE (REVIEW DATE)

USE ONE PAGE FOR EACH TRAINING GOAL

STRATEGY FOR ACHIEVING PERSONAL GOALS

PERSONAL GOAL #

PERSONAL GOAL #

TARGETED ACHIEVEMENT DATE: _____

TARGETED ACHIEVEMENT DATE: _____

ACTION PLAN: _____

ACTION PLAN: _____

PROGRESS NOTED/ ADJUSTMENTS MADE:

(REVIEW DATE _____)

(REVIEW DATE _____)

(REVIEW DATE _____)

PROGRESS NOTED/ ADJUSTMENTS MADE:

(REVIEW DATE _____)

(REVIEW DATE _____)

(REVIEW DATE _____)

STRATEGY FOR USE OF NATURAL AND GENERIC SUPPORTS AND LINKS TO COMMUNITY

WHAT ROLE WILL FAMILY MEMBERS PLAY?

WHAT ROLE WILL NEIGHBORS AND FRIENDS PLAY?

HOW WILL COMMUNITY GROUPS / ASSOCIATIONS (CHURCHES, CLUBS, ETC.) BE USED?

HOW WILL THE PERSON USE LOCAL BUSINESSES, SERVICES, AGENCIES, ETC? (DON'T INCLUDE OTHER MED. WAIVER FUNDED SERVICE PROVIDERS.)

DATA COLLECTION SYSTEM TO BE USED TO ASSESS PROGRESS IN ACHIEVING GOALS:

At the time of the support coordinator's quarterly meeting with the individual, the supported living specialist will complete a quarterly meeting worksheet. This worksheet will document the review of all support and training services, note progress made in achieving goals, and record any changes in program direction and/or this plan requested by the individual and/or family/guardian. Data related to success achievement will also be added to this implementation plan. The annual summary will record the progress made on each goal during the support plan year.

AUTHORIZATION

What level (# of hours) of Supported Living Coaching Services is authorized on the service authorization?

_____ hours per _____

NOTE: SERVICES CANNOT BEGIN OR CONTINUE WITHOUT A CURRENT SERVICE AUTHORIZATION.

SIGNATURES

Support Coordinator Signature _____

Individual (or Legal Guardian) Signature: _____

Courtesy of Habilitative Services of North Florida.

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IMPLEMENTATION PLAN			
Individual's Name		Social Security #	
Address		Phone #	
Date Services Began			
Support Plan Date			
Date Support Plan Received			
SP Effective Date			
Implementation Plan Date			
SPA Form Received			
Copy to Guardian		How sent?	
Copy to WSC		How sent?	
Guardian/Parent		Phone #	
Family/Friend		Phone #	
Support		Phone #	
Program Administrator and Supported Living Coach (es)		Phone #	
SIGNATURES			
Individual			
Guardian			
Informants			
Supported Living Coach			
<p>The instrument used for evaluation of the individual's monthly progress is the case notes/service notes and logs. The method for accessing a supported living staff person 24/7 is through staff pagers/cell phones.</p>			
STAFF AND NATURAL SUPPORTS			
HEALTH AND MEDICAL ISSUES			
HOME & COMMUNITY SAFETY NEEDS & SUPPORTS			

IMPLEMENTATION PLAN

Implementation Plan Date	
--------------------------	--

Individual	
------------	--

PERSONAL GOAL

--

SUPPORT SERVICES

Home Care	Health & Safety	Financial	Self Care & Personal Growth	Comm. Integration & Leisure Time	Other (specify)

SUPPORT PROVIDER

SLC	Transportation	Companion	PCA	NRSS	IHSS	Other (specify)

STAFF PERSON(S) RESPONSIBLE FOR SUPPORT/SERVICES

--

ANTICIPATED COMPLETION DATE	
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DATE OF AMENDMENT(S)	
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SUPPORTS/SERVICES NEEDED

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ACTION PLAN

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Courtesy of Pinellas Care System, Inc. of St. Petersburg, FL

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Selecting A Home (Excerpts Courtesy of Dale DiLeo)

When Selecting a Home, Consider:

- Density
- Personal Rights
- Affordable Housing
- Separating Housing from Supports
- Accessibility
- Fair Housing Act
- Home Ownership

Density

Once the person's preferences and capacities have been explored, it is time to locate and select a place to live. Finding a home is the most important element of the transition planning process.

In supporting the individual in finding a home, it is important to consider density, personal rights, aspects of affordable housing, restrictions on provider-owned housing, and home ownership.

As with any initiative, supported living is at risk of being turned into a "business" that is not about people but about staff convenience. For this reason there are rules concerning the number of people in supported living who can live in the same small geographical area (density). Persons using supported living services can utilize no more than ten percent of the housing in a city block, subdivision, neighborhood, apartment or condo complex, or mobile home park. Waivers of this density requirement can be made by the District/Region Developmental Disabilities Program Administrator but must be based on the choice or request of the individual. Waivers must be approved prior to the move.

Living in supported living frees the person from the confines of state or provider owned housing. Individuals in supported living live with no more than two other persons with disabilities and share control of the home with those persons. These requirements are included in Florida Administrative Code in the Developmental Services Waiver Services Medicaid Coverage and Limitations handbook,

The goal of supported living is to create opportunities for individuals to become a part of their community. Historically, people in group homes and other congregate settings have not "fit into" their neighborhood due to the

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obvious difference in their home (e.g. vans in the driveway, people going in and out, etc.). If neighborhoods become “communities of individuals in supported living”, they too will have difficulty truly becoming part of their community.

Respecting Personal Rights

Individuals in supported living, by not occupying state or provider owned housing, experience greater opportunity to maximize personal control of their home environments and daily routines. Because everyone has the same right to privacy, any home visit requires agreement of the individual ahead of time and should be conducted with sensitivity, courtesy, respect, and restraint from unwarranted intrusion. Under most circumstances, the support coordinator, supported living coach and other support providers should phone ahead before making an unscheduled visit and, upon arriving, knock and wait to be invited inside. Except for life-threatening emergencies, an individual's home should be entered only when the individual extends an invitation or permission. Everyone enters as a guest because of the individual's freely given hospitality.

Affordable Housing

Over the last few years, supported living has provided more individualized and normalized living options for Florida citizens with developmental disabilities. One of the barriers to supported living in this state is the lack of affordable housing.

Most individuals with developmental disabilities earn below the poverty level, and often cannot afford market rents in many areas, leaving them with limited housing options. These include leasing homes or apartments in undesirable areas, sharing their home with others in similar circumstances, or moving into pre-existing facilities that congregate people based on their deficits or challenges.

Although locating affordable housing may be challenging, there are many resources available to assist individuals in stretching their budgets. These various ideas and initiatives may be found in [Finding A Home: Practical Information About Buying Or Renting a Home](#), available from the Florida Developmental Disabilities Council, website for download (www.fddc.org).

Examples of initiatives that offer assistance related to housing may include:

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Affordable Housing Considerations:

- **Do I want to share my home so I can share expenses?**
- What is the **best place for my home** (close to employment, community connections, transportation, services, supports, etc.)
- **Renting?**
 - from a trust
 - from a friend
 - shared home programs
 - housing assistance groups
- What **costs will I be responsible for**, given the various options?
- **Rent subsidies?**
 - Department of Housing and Urban Development (HUD) Section 8
 - Farmers Home Administration (FMHA)
 - State programs (Local Housing Finance Agency- 850-488-4197)
 - Local governments (Contact local county and city housing office)
- **Home Ownership?**
 - Equity sharing programs
 - Shared property owner
 - Home Buyers Club
 - Local, state, or federal housing programs for financing, subsidies, etc.
 - Low interest loans (e.g. Federal Housing Administration, Fannie Mae financing options, etc.)
- **Assistance with Utilities and Food**
 - City and county subsidies
 - Power company subsidies
 - Food banks, cooperatives, "Meals on Wheels," etc.
- **Others**
 - Churches
 - Community garden cooperatives (fresh fruit and vegetables, etc.)
 - Non-profit organizations (e.g., Salvation Army, etc.)

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Things to Consider When Looking for a Home

During transition planning, the coach and the individual have looked at those items to be considered when determining affordable housing options. To decide which housing option will best meet the needs and desires of the individual, consider the following (Finding A Home):

1. The best place to live is one selected by the individual that offers a variety of resources important to him. While a number of these were mentioned above, it is important to differentiate the context in which they are reviewed. For example, proximity may first be thought of in terms of the cost or savings involved when considering the affordability of the housing location. It may also be important to review these resources and their proximity in terms of the quality they bring to the person's life. Such things may include nearness to:
 - a. employment or other meaningful day interests;
 - b. accessible public or private transportation routes;
 - c. needed services such as medical or community centers, etc.;
 - d. places of interest such as churches, movies, shopping, etc.; and
 - e. community services such as fire protection, police, social services, city parks and recreation, etc.
2. Does the individual wish or need to share his or her home? Many persons find that having a roommate provides companionship as well as reduces expenses. However, sometimes sharing a home can be challenging. Everyone needs "down time" and personal space. Sharing a home may mean compromising some things that may be important. Ask the support coordinator about local district or regional lists of individuals seeking roommates.
3. If having a roommate or someone to share expenses with is a viable option, it will be necessary to work out how expenses will be shared. Having a personal budget outlined will assist with determining options.
4. When exploring specific housing options, the person has two choices—buying or renting. For many, ownership represents security, while others may see it as a serious responsibility. Renting offers a lot of flexibility when compared with ownership. When renting, the landlord/person who owns the property pays the costs of property taxes, and repair. The decision to rent or own is a very personal one and something to be considered when deciding where and with whom to live.

A resource for accessing information related to housing is TAC, Inc., located in Boston, Massachusetts. TAC, Inc., can be accessed through their "housing

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link," and offers "Section 8 Made Simple." This and other housing assistance information may be found at: <http://www.tacinc.org>

Separating Housing From Supports

The current Florida Supported Living Rule (65B-11.005 F.A.C.) and DS Waiver handbook prohibits providers of supported living services and members of their immediate family from owning the homes of the people they support. These rules state the following concerning this issue:

Eligible Support Living Settings

I. Chapter 65B-11.005 F.A.C. - Selection of Housing:

- *The individual shall select a home available for lease or sale to any member of the community based on the individual's own choice and personal financial resources with assistance from the supported living coaching provider as needed.*

II. DS Waiver handbook:

- *The following criteria identify an eligible supported living setting:*
 - a. **The name of the individual appears on the lease or mortgage** either singularly, with a roommate(s), or with a guarantor;
 - b. **Neither the supported living coaching provider nor the immediate family of the supported living provider shall serve as landlord** or have any interest in the ownership of the housing unit, and
 - c. **No more than three persons** who have developmental disabilities live together in a single housing unit.
 - d. The homes of **individuals receiving supported living coaching services shall account for no more than ten (10) percent of the housing** in the smallest identifiable geographical area in which the homes are located, which may be a city block, subdivision, etc. The individuals' homes shall be scattered, noncontiguous, and dispersed throughout that area.

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Selection of Housing, continued

- e. *Waivers of item (d) above may be granted, as previously discussed, by the District/Region Developmental Disabilities Program Administrator. The waiver may be granted in situations where individuals desire to live more closely together.*

Providers who succeed in offering more affordable living options in attractive neighborhoods, but keep housing ownership and management with the service provider, still constitute a conflict of interest prohibited by the DS Waiver handbook and the Florida Supported Living Rule (65B-11 F.A.C.). The reason is that individuals may possibly need to negotiate issues with a support provider who is also her landlord. The dual role of landlord and support provider can potentially diminish the person's control over her home.

In addition, fixed housing options (e.g., a supported living arrangement where individuals move in and out of the residence operated by the provider), even affordable ones, are not aligned with the principles of choice and supported living. As current residents leave, new applicants must apply for provider-controlled housing in locations and with existing roommates that are not necessarily freely chosen – a scenario not unlike a traditional group home.

These types of agencies typically select homes that fit a profile that includes one-story construction and location within a certain distance of shopping and services. This is because most agencies believe flexibility is needed for homes to be rentable to the greatest numbers of people. The approach contradicts core values of supported living in which homes are developed from each individual's perspective, not some perceived common denominator.

Supported living is based upon the premise that individuals choose where and with whom to live. This premise relies on an open market within a desired community. Providing affordable and attractive housing, but only under conditions of small groups of people with disabilities, solves a financial need but at the cost of still limiting options among people already limited by income, discrimination, and few choices of living arrangements.

Still another reason to separate housing and services is the challenges of property management. Maintaining a home in good repair is often difficult, time-consuming, and can potentially take away from the time and resources of the provider. Concerns related to damages, repairs, vacancies, capital

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replacement, late rent payment, lease violations, and the like will certainly tax any agency providing residential services and supports.

Creating an Accessible Barrier-Free Home (Courtesy of Beth Kofsky, Stein Gerontological Institute, Accessible Housing Division).

An accessible barrier-free home environment for persons with a disability can be successfully achieved by starting with a comprehensive assessment. This assessment will ultimately assist individuals to remain as independent as possible. Persons with a disability can live, work, attend school and participate in the community if the home environment promotes, encourages, and provides opportunities for independent living.

To maximize use of the Environmental Accessibility Assessment, a team approach should be utilized. To assist in the process, a self-conducted *Environmental Accessibility Checklist* could be completed.

Suggested team members to support this process may include:

- Persons receiving services
- Family member(s)
- Support Coordinator
- Supported Living Coach
- Caregiver(s)
- Clinical or health care provider(s)
- Environmental Accessibility Specialist
- Engineer
- Contractor
- Architect
- Interior Designer
- Rehabilitation Technology Provider

Environmental accessibility modifications should create a safe/accessible and independent living environment based upon the person's specific needs and desires. The section on Environmental Accessibility Adaptations found in the DS Waiver handbook will further assist in understanding the guidelines regarding coverage of what can and cannot be completed under waiver funding.

A copy of the *Environmental Accessibility Checklist* used to assist individuals in determining their home accessibility needs follows.

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Date: _____

ENVIRONMENTAL ACCESSIBILITY CHECKLIST

Name: _____

Phone: (____) _____ Other: (____) _____

Address: _____

City: _____ State: FL Zip: _____

The purpose of the survey is to assist in determining your Environmental Accessibility & Barrier-Free housing needs prior to the on-site assessment.

Please answer all questions carefully. Respond by checking off and providing the information for the areas to your specific needs within your current home environment. Thank you for your assistance in completing the survey.

1. I need accessibility to my front entrance. No Yes: check item that applies.

- check if entrance is not at front of home*
- Ramp _____
- Walkway _____
- Railing _____
- Larger entry way _____
- Special door opener _____ Garage or other door _____
- Lift system/ other _____
- Other, explain: _____

2. I need retrofitting in my bathroom. No Yes: check item that applies

- Change Shower (to rolling style, curbless) _____
- Grab bars _____
- Roll under sink _____
- Door widening _____
- Roll under vanity _____
- Lift system _____
- Special equipment _____
- Non-slip flooring _____
- Other, explain: _____

3. I need retrofitting in my kitchen. No Yes: check item that applies

- Sink: Roll under _____ Lower _____
- Cabinets: Lower _____ New _____
- Counter: Lower _____
- Stove: Front controls _____ Roll under _____
- Floor: _____
- Other accessible appliances: _____
- Other, explain: _____

4. I need retrofitting to my bedroom. No Yes: check item that applies

- Grab bars _____
- Railing _____
- Door widening _____
- Shelving _____
- Flooring _____
- Bed system _____

- Lift system _____
- Other, explain: _____

5. I need retrofitting to my:

CHECK: living room family room dining room

- Railings _____
- Door widening _____
- Ramping _____
- Special Equipment _____
- Grab bars _____

6. I need retrofitting in my hallway areas. No Yes: state location of _____

7. Other retrofitting requests. Explain: _____

8. Signature: _____

Please print name _____

If not the person needing modification, please state relationship: _____

Please return to:

OFFICE USE ONLY

Completed over the phone: _____

Person taking information _____

Other notes: _____

Completed by Individual: _____

Date received in mail _____

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Fair Housing Act

When considering places to live, it may be important for the supported living coach to be aware of laws related to affordable housing. Title VIII of the Civil Rights Act of 1968 (Fair Housing Act) offers protection against discrimination. Having access to this knowledge may assist the coach in working with property owners in supporting persons to live in a desired, affordable, location.

The Fair Housing Act prohibits discrimination "related to the sale, rental, and financing of dwellings, and other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including children under the age of 18 living with parents or legal custodians, pregnant women, and people securing custody of children under the age of 18, and handicap (disability))."

Access to additional information regarding the Fair Housing Act, including grievance procedures and enforcement, may be obtained on the "Homes and Communities" website for the US Department of Housing and Urban Development (HUD) at <http://www.usdoj.gov/crt/housing/title8.htm>

Home Ownership

In the words of disability advocate John O'Brien, people with disabilities "know only stairs that are never their own." According to O'Brien, "Today's service systems developed around the unspoken assumption that people could not have both severe disabilities and homes of their own."

"People with disabilities, like all of us, have a strong need for a real 'sense of place.'"

"People with a sense of place comfortably inhabit and personalize their homes. They choose the ways they want to invest their time, skills, energy, and money in the routines of homemaking... a sense of place offers people a physical and emotional base from which to depart and to which to return... Control of the threshold, the power to invite others in or keep them out, give people who are at home the capacity to offer the gift of hospitality..."

Home "ownership" does not have to mean that the individual with a disability, who may not have many financial resources, must hold the mortgage to a house. But it does mean at a minimum that he or she is the signer of the lease, owns the things in the home, and has selected the roommate(s) and hired support people.

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According to the National Home of Your Own Project (Klein & Wilson, 2000), home financing is creative and specific to each person's assets and needs. Lending institutions are acknowledging public benefits as a viable source of income for borrowers. Individuals obtain mortgages they can afford and the lenders sell more mortgage loans to a new-found customer base with a stable income stream.

Some of the major areas of concern involve savings, credit and employment. Individuals who receive SSI and Medicaid funds, for example, cannot accumulate assets in excess of \$2000.00 without jeopardizing the Social Security benefits that would fund their mortgage payments. Because of these resource restrictions, persons receiving public benefits do not have the ability to accumulate enough money for down payment and closing costs. Poor or no credit is an ongoing concern as most people with disabilities have lived most of their lives in situations where their finances were managed by others. They have never had the opportunity to develop a credit history.

Finally, many individuals with disabilities do not have employment that provides sufficient income, but they do have a steady income source from public benefits. Rather than simply dismiss the possibility of obtaining a mortgage, lenders around the country are establishing new lending criteria. They are reassessing the importance of savings and employment as the foundation for granting a mortgage.

Just like any other home-buyer, the participant usually works through a private lender or housing finance agency for the primary loan. Down payment and closing costs are then secured through secondary loans and grants from a variety of funding sources. Three ways in which down payments, closing costs, repairs, and renovations are financed through subsidies include:

1. Secondary Loans (promissory notes secured by second mortgages) from state housing finance authorities; HUD HOPE 3 and HOME funds; and Federal Home Loan funds.
2. Gifts from family, friends, or civic groups; and
3. Grants and loans
 - community block grant funds;
 - state housing finance agencies;
 - contributions from the seller;
 - private foundations;
 - state and local affordable housing programs;
 - endowments for first-time home buyers;
 - from state and local human service agencies; and

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- state developmental disabilities agencies.

Supported living coaches are creative problem-solvers who often "think out of the box." Knowing options, resources or where to locate the most current information is the starting place for supporting a person in buying a home. Being an advocate also leads to opportunities and answers that have not yet been considered, or attempted. As many a coach has discovered, there is truth to the old adage: "Where there's a will, there's a way."

Completing the Individual Financial Profile

As mentioned, the Individual Financial Profile (IFP) is completed no more than ten (10) days following the selection of a home and submitted to the support coordinator. For persons receiving a monthly stipend, an IFP must be completed quarterly by the coach.

Including this step in the transition plan will help assure the transition is a smooth one.

Requesting Additional Funding

The support coordinator may also request start-up funds or a monthly in-home subsidy if it is needed, and no other options are available. Approval of these funds varies from district to district based on the availability of funds.

If the Individual Financial Profile (IFP) indicates a need for a subsidy, one time or recurring, the request must be submitted and approved by the District/Region before the person signs a lease.

An **in-home subsidy** is a set amount of general revenue money which may be provided to persons with a demonstrated need for financial assistance. This financial assistance can be provided directly to the individual or provider and includes such expenses as utilities, food, and other household expenses. Because of recent budget appropriations, these are becoming even more scarce.

Chapter 393, Florida Statutes, outlines the categories of allowable expenditures for in-home subsidies. The following are approved categories:

- rent
- toiletries
- utilities
- food

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- clothing
- other household items
- household supplies

Subsidies may not be used for:

- A contractor for the provision of services and supports to the consumer.
- Medical or dental services.
- Medicines, medical supplies, or adaptive equipment or aids.

Start up funds may be provided to individuals beginning supported living services if funds are available. These funds are considered start-up grants and may assist with purchasing items needed for the new home, initial deposits for rent and utilities, etc.

Adequate justification for these funds must be provided to the support coordinator who submits the request to the District/Region for review. The coach and members of the circle of support need to assist the individual in obtaining the items he will need to begin life in a new home. These items may come from family and friends, thrift shops, or department stores, depending on the budget. Supporting the person in obtaining needed items is the responsibility of the supported living coach.

Completing the Housing Survey

As another part of the housing search, the supported living coach helps the individual survey a prospective home to ensure that it is safe to inhabit. The supported living coach must forward a copy of the survey to the individual's support coordinator within ten (10) working days after the home is selected.

The survey should be updated quarterly and made available for review by the support coordinator at the time of the support coordinator's quarterly home visit. This quarterly update must include a review of the individual's current health, safety and well being. Should deficiencies be noted in the Housing Survey, a waiver must be requested and approved by the District/Region Developmental Disabilities Program Office prior to moving into the home.

An example of an Initial Housing Survey format, courtesy of Habilitative Services of North Florida, follows.

SUPPORTED LIVING SERVICES
INITIAL HOUSING SURVEY

NAME _____

ADDRESS _____

DATE OF SURVEY _____

MOVE-IN DATE _____

(If before date of survey, explanation must be included)

_____ Individual's name is on the lease/mortgage.

_____ Copy of lease has been placed in individual's records at HSNF office.

_____ The dwelling is located in an area which accounts for no more than 10 percent of the houses or 10 percent of the units in an apartment complex.

_____ No more than two other people who have developmental disabilities reside in the home

_____ Flush toilet in separate bathroom, in working condition

_____ Fixed basins (kitchen and bathrooms) with hot & cold water, in working condition

_____ Shower or tub with hot & cold water, in working condition

_____ Bathroom has at least one opening window or exhaust ventilation

_____ Water from hot water heater not more than 120°F

_____ Non-skid surfaces are present in all bath tubs and shower stall floors.
(Removable rubber mats or adhesive strips are acceptable.)

_____ Suitable place to store, prepare, & serve food in sanitary manner

_____ Garbage can / bin

Initial Housing Survey (cont.)

- _____ Stove or range of appropriate size, in operating condition
- _____ Refrigerator of appropriate size, in operating condition
- _____ Kitchen sink with hot & cold water
- _____ A portable fire extinguisher is located in kitchen
- _____ Sink drains into approved public or private system
- _____ Separate living room & at least one bedroom
- _____ Safe heating & cooling that reaches all rooms (unvented room heaters than burn gas, oil, kerosene not acceptable)
- _____ One operative window in each living & sleeping room
- _____ Window dressings are adequate to maintain privacy
- _____ At least two electric outlets in the living area, kitchen, & each bedroom
- _____ At least one smoke detector is mounted in an appropriate location and functions (fresh batteries!)
- _____ No serious defects in interior / exterior walls, ceiling, or floor; floor should not move when walking
- _____ No visible safety hazards are apparent, including empty light sockets, frayed cords or wires, or discoloration around electrical sockets
- _____ Roof structure is firm
- _____ No danger of tripping in stairways, halls, porches, walkways
- _____ Free of dangerous levels of air pollution from carbon monoxide, sewer gas, fuel gas, dust, etc.
- _____ Air circulation adequate throughout

Initial Housing Survey (cont.)

_____ Water supply free of contamination

_____ Alternate means (doorway for individuals using a wheelchair) of escape available in case of fire

_____ Handicap facilities are available and accessible for individuals using a wheelchair

_____ If required, grab bars are mounted in appropriate locations.

_____ Free of lead base paint

_____ Elevator in safe, operating condition (if applicable)

_____ Free of rodent infestation

_____ Neighborhood free of health hazards such as dangerous walks steps, poor drainage, sewage hazards, abnormal air pollution, excessive accumulation of trash, rodent infestation, or fire hazards

_____ Unit able to be used freely & maintained without unauthorized use by other individuals

Any other comments regarding the individual's housing that should be considered:

Waivers requested (if any) _____

Date waiver requested _____ Date waiver approval received _____
(copy of approval must be attached.)

Supported Living Coach Signature _____

Date _____

Support Coordinator Signature _____

Date _____

(Form courtesy of Habilitative Services, Inc. of North Florida)

Chapter Five: Planning Supports

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Chapter Summary

Through well thought-out, thorough transition and implementation planning, and timely completion of other required documents (i.e., IFP, Funding Requests, Housing Survey), the supported living coach has taken the final steps necessary to assure the person's smooth transition into a supported living arrangement.

When selecting housing, the coach has carefully considered density, personal rights, affordability, and accessibility. A review of resources that may be utilized, should the person prefer home ownership to other housing options, has been made, and financial arrangements are in place.

Chapter Six focuses on the move itself, and the implementation of supports and services in the person's new home.

Chapter Five: Planning Supports
