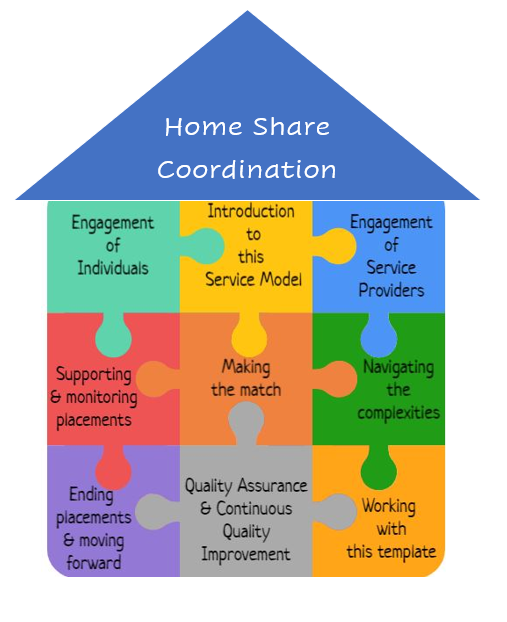
Home Share Coordinator Handbook Template



A Practice Guide for Home Share Coordinators/Managers in BC

Acknowledgements

The Home Share Coordinator Handbook Template: A Practice Guide for Home Share Coordinators/Managers in BC is an initiative of the BCCEO Network funded through the Ministry of Social Development and Poverty Reduction (MSDPR).

It has been produced with the guidance of two reference groups: a Working Group of the BC CEO Network and a Reference Group of Home Share Coordinators from both large and small, and rural and urban service providers who hold contracts to provide home share coordination.

We wish to acknowledge the expertise, guidance, and support of these two groups whose contributions helped to shape this resource:

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# Backgrounder on this Resource

## 1. Why a Home Share Coordinator/Manager’s Handbook

The need for a comprehensive handbook to guide Home Share Coordinators in their work, and to support consistency across the sector, surfaced as a high priority in the recent research on home share training needs in BC conducted by the BCCEO Network. This priority was included in the report: *Keys to Success: Training for the Home Share Sector in BC, December 2020*. People identified the need for this type of resource to serve as an initial training guide for organizations to use when training new home share coordinators/managers and as an ongoing working manual for all active home share staff to support their day-to-day practices and ensure consistency across the organization.

Note – The term handbook and manual are interchangeable in this resource. You can choose one or the other or both as you start to customize this template to match your organization’s terminology.

## 2. A Collaborative Effort

#### A. Who Was Involved in Developing this Handbook

As a follow up to the research report, *Keys to Success: Training for the Home Share Sector in BC, December 2020,* the Network contracted with the team of Liz Kellough and Kim Lyster to design and develop this handbook. The handbook is just one of the training resources the BCCEO Network plans to develop to support this sector.

Because this team had already been involved in the original research project, they were able to draw on this previous work consulting with and gathering input from agencies delivering home share services across the province. They also sent out a call for resources to member agencies of the BCCEO network and brought together a reference group of Home Share Managers/ Coordinators representing all 5 regions of the province to help guide their work. As each chapter of the handbook was developed, it was reviewed, and input provided by the members of this reference group and the BCCEO Network HomeShare Training Working group. The full template was then reviewed as a whole and further refinements made based on feedback from both groups. This template is the final result of the contributions of all involved.

#### B. Practical Uses for this Handbook

At the initial meeting with the reference group, members helped to consider potential uses for the handbook that could guide its development including:

* Onboarding/initial training for new coordinators
* Ongoing staff training
* Personal practice guide - ongoing reference for staff
* Supervision
* Quality monitoring
* Promoting best practice and excellence in delivering the coordination of home share services
* Conformance with accreditation standards

Part of the intent behind this handbook is to support consistency in practice across the province based on best practice standards. Content has also been developed to match the *CLBC Standards for the Coordination of Shared Living* that are currently being developed for service providers in the sector.

#### C. Additional Resources: Supporting Collaboration in the Sector

After careful consideration, it was decided that sample forms and resources would not be included in this handbook template. Many organizations throughout BC have already developed their own and have tailored them to fit their particular focus and needs. Given the wealth of these types of resources already available, there has been some interest expressed in setting up an on-line library, organized by the chapters of the handbook, where organizations can share the resources they have already developed. To date, this has not been taken up by anyone but may be food for thought once this handbook is in use across the sector.

#### D. Tailoring this Resource to Match Your Organization’s Practices

This handbook has been designed as a template that you can customize to make your own. It can be customized to reflect your agency’s policies and practices and terminology. It can also be expanded to include sections where your Home Share Coordinators/Managers can add in relevant materials and resources such as local community services contact information, fact sheets or forms etc. that are relevant to each of the chapters.

# 

# Guide to Working with This Template

## 1. About this Template

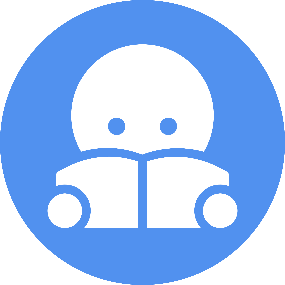
This template has been developed using Microsoft Word 365. It can be converted to other software platforms by copying and pasting to other Microsoft products such as Publisher or PowerPoint, or to other software products.

Instructions in this guide focus on updating the current template directly in Word and/or transferring content from this template to a Word document.

## 2. Getting Started

### A. Home Share Team

a) **Familiarize Yourself with the Content**: Before jumping in to adapt this template, make sure you review the entire contents starting at Chapter 1 with your team and/or assign to the team leader. This review needs to be completed by people with a solid background in your Home Share Services and in your organizational culture, policies, and practices.



Understand the handbook first

Your focus here will be on:

* Catching any practices listed that you do in a different order, use a different approach and either need to flag to change in your version and/or want to flag as a change to your practice if you prefer the one outlined in the template.
* Identifying any practices in the handbook that are new to you, not part of your current practices that either need to be eliminated from your version, and/or that you want to highlight as a new practice you want to implement.
* Flagging the highlighted terms in the template and inserting the terms you use i.e., the name of the position you use for [designated leader].
* Deciding how you will reference your policies, organization charts etc. that are shown in the template. Note: As much as possible, it is better to link to electronic documents or file locations rather than inserting copies of documents that then have to be changed each time you make a change to one of these documents.
* Reviewing, and if needed, coming up with different questions or different solutions to the QA in each chapter to match the approach your organization takes.

b) **Take time to consider and explore how you will make the handbook relevant and a useful reference for your staff in their day-to-day work.**

Consider:

* How you can make it the easiest to use and most accessible for staff:
  + Should it be bound, in a binder, or made accessible electronically?
  + Will each staff get their own copy so they can annotate it, add resources they collect etc.?
* How can it be set up to easily find things:
  + Does the layout work well? Do titles fit your organizational terms, do topics flow together well?

c) **Map out the plan so that the person assigned to customize the template has a clear guide**

This step is especially important if the task of converting the template is assigned to someone outside the Home Share team who has not been part of the steps above.

* Print the template and mark any changes to the order or format
* Develop a legend of terms to match the highlighted sections of the template i.e.

[Name of agency]= (be specific if you want to use the acronym or full title)

[Designated leader]=

[Coordinator or Manager]=

[Name funders]=

NOTE: The highlighted names above are examples only…find and highlight all renaming you need to do i.e., names of forms, policies etc.

* Flag where and how you want information about your organization to be inserted.
* Decide colours to use, font, heading styles etc. to reflect your org (or specify to keep the same as the template)

### B. Person Assigned to Create Your Version

Using this template requires proficiency with MS Word. Adjusting the content may cause many of the graphics and text boxes to shift out of place and will require adjustments, so make sure you assign someone who has the technical skills to be able to work with this template

a) Make an electronic copy of the template before doing anything else and rename as the Master. Store this copy separately as your back up

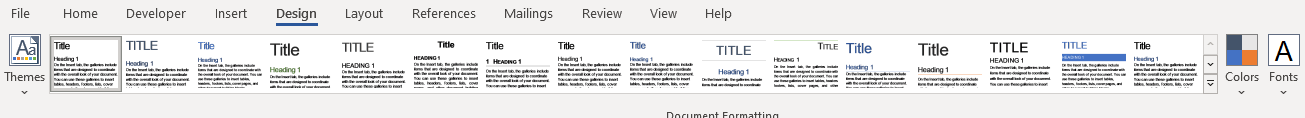
b) Review the template to understand the layout/format etc. that will be your starting point.

c) Review the guide provided by the team (c above) and cross-reference to the template. Clarify any details that are not clear.

d) Create a new MS Word Document that matches the font, heading styles, and colours noted in the guide you received from the team. Save as your draft new version. *NOTE: It may be tempting to just change the current template and it is an option. However, if you anticipate making a lot of changes to the template, it can be easier to methodically go through each section, copy as you make your changes and paste to the new document rather than fussing with the shifting of graphics and text boxes that will occur when you start inserting additional text to the template or changing the type or size of the font, heading styles etc.*

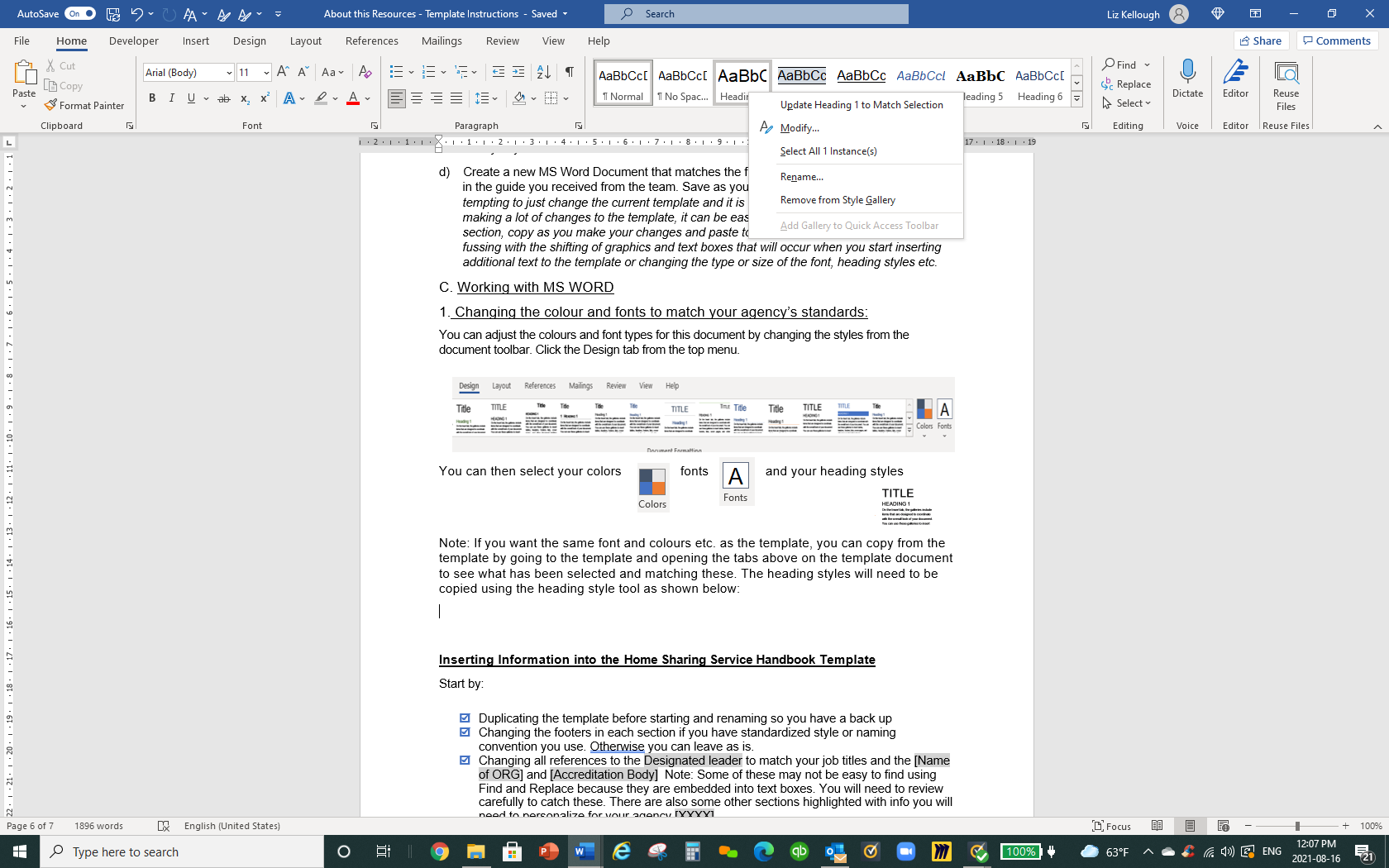
## 3. Working with MS WORD

#### A. Changing the Colour and Fonts to Match your Agency’s Standards:

You can adjust the colours and font types for this document by changing the styles from the document toolbar. Click the Design tab from the top menu.

You can then select your colors fonts and your heading styles

Note: If you want the same font and colours etc. as the template, you can copy from the template by going to the template and opening the tabs above on the template document to see what has been selected and matching these. The heading styles will need to be copied using the heading style tool as shown below: You can select and modify each heading in your document to match the template or your own preferred headings.

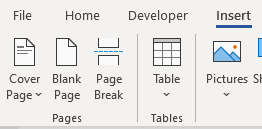


Styles are displayed from the Home Tab

#### B. Moving or Creating Your Cover Page and Section Title Pages

This step can be done before you update and move the content for each section. That way you have easy dividers between each section to mark your progress.

Decide whether to use the ones from the template to copy and paste or create your own by inserting a blank page to create a custom design or choosing cover page to use a free template.

To create a new one, choose Insert from the Top Menu Bar and then make your selection – either Cover Page or Blank Page and fill in the details from there.

#### C. Changing Text in Each Section

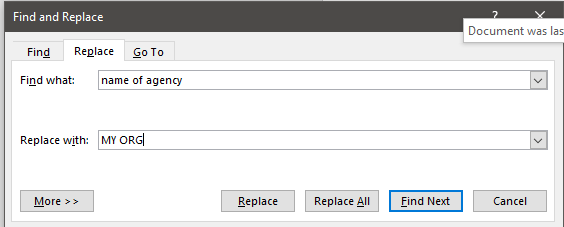
#### a) Using Find and Replace

As a first step, on the template itself, you can use the find replace tool to update information according to the legend provided to you.

[Name of Agency] is a good place to start. You can find all locations where name of agency has been referenced and replace with your organization’s name



From the Home Page Top Bar click Replace to open the replace wizard.



Rather than choosing Replace all, it is best to go through this step methodically, so you don’t inadvertently replace in areas where it doesn’t fit.

NOTE: This feature might not work in text boxes or other graphics so it will be important to go through the document after you have completed this step to see if there are any references that were not found. Also…do not change the references in the table of contents. They will adjust when the changes have been made throughout the document (more about this later).

#### b) Editing, Adding, Changing Text

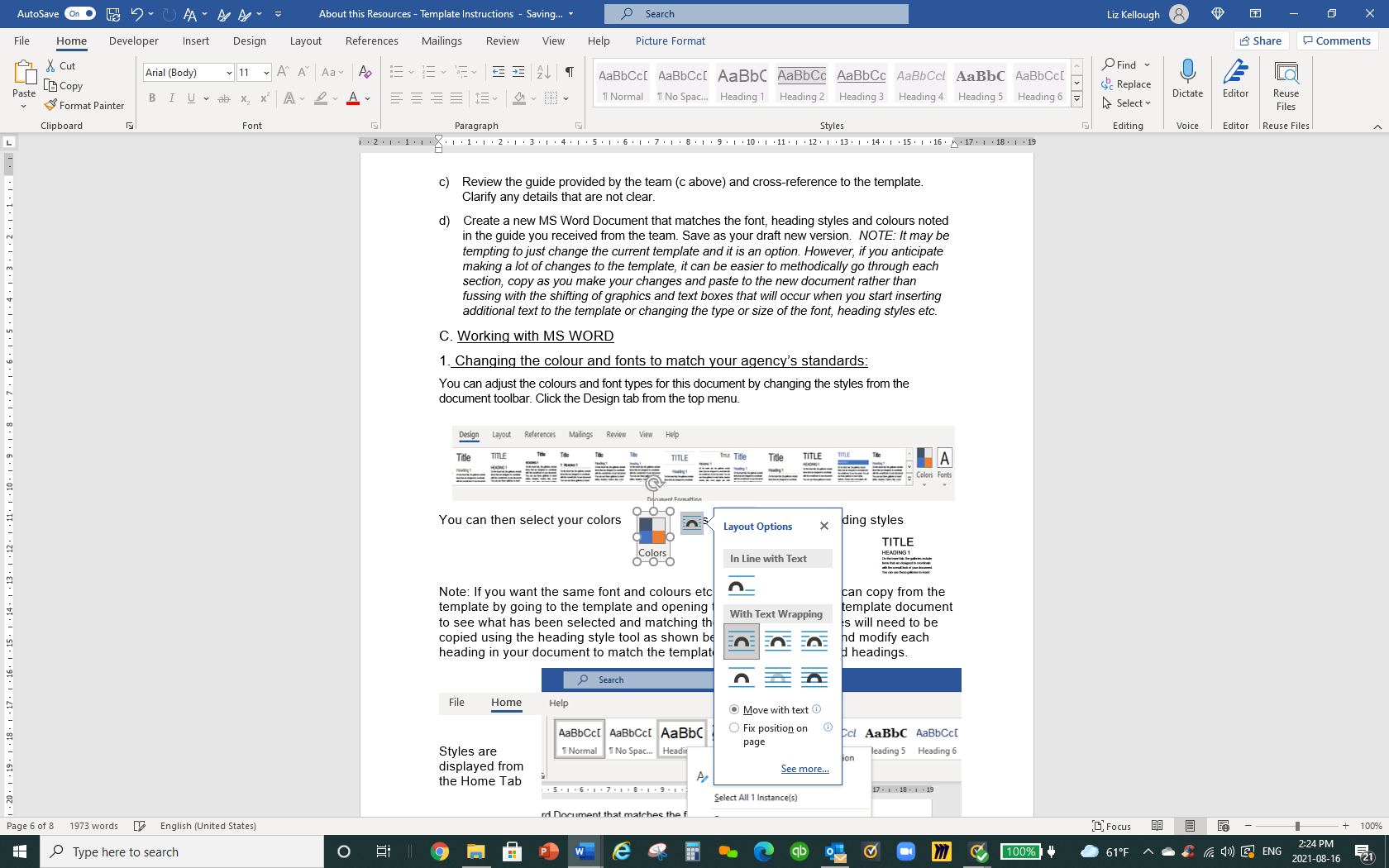
It is likely easier to work on each section of the template separately when editing, adding, or changing text. Once all the text is updated, you can copy to paste to your new version and then worry about formatting.

Graphics and text boxes have been inserted throughout the text to make for a more reader friendly page. When you add or adjust text, these graphics will shift and, in some cases, move to a new page depending on their size. This can be frustrating. Rather than try to ‘fix’ as you go, wait until you have all the changes to text for the section made.

#### D. Moving or Changing Graphics

Text boxes and graphics are set to the wrap around text using the ‘Square’ text wrapping mode. This allows you to move any of them easily and prevents them from overlapping with your text. You can see or change this mode by clicking on a graphic and then clicking on the layout image

as shown here.



Click on the graphic so that the border shows and the layout image appears on the top right of the graphic. Right click this layout image to open the choice of layouts. When you hover over any choice it will show what it is i.e., square.

You can reshape your graphics to fit different spaces by clicking on the graphic so the border shows. Hover your mouse over one of the points to get the arrow bar that will allow you to rearrange the size.

Please Note:

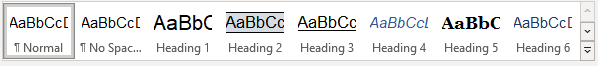
You will see that some graphics have been attributed to a source under the creative commons license where an attribution must be shown. Others are licensed under the Creative Commons License CC 1.0 which is in the public domain and can be used freely. See details <https://creativecommons.org/publicdomain/zero/1.0/>

Others are attributed to a specific source.

Finally, we have also created our own graphics using free icons in Word.

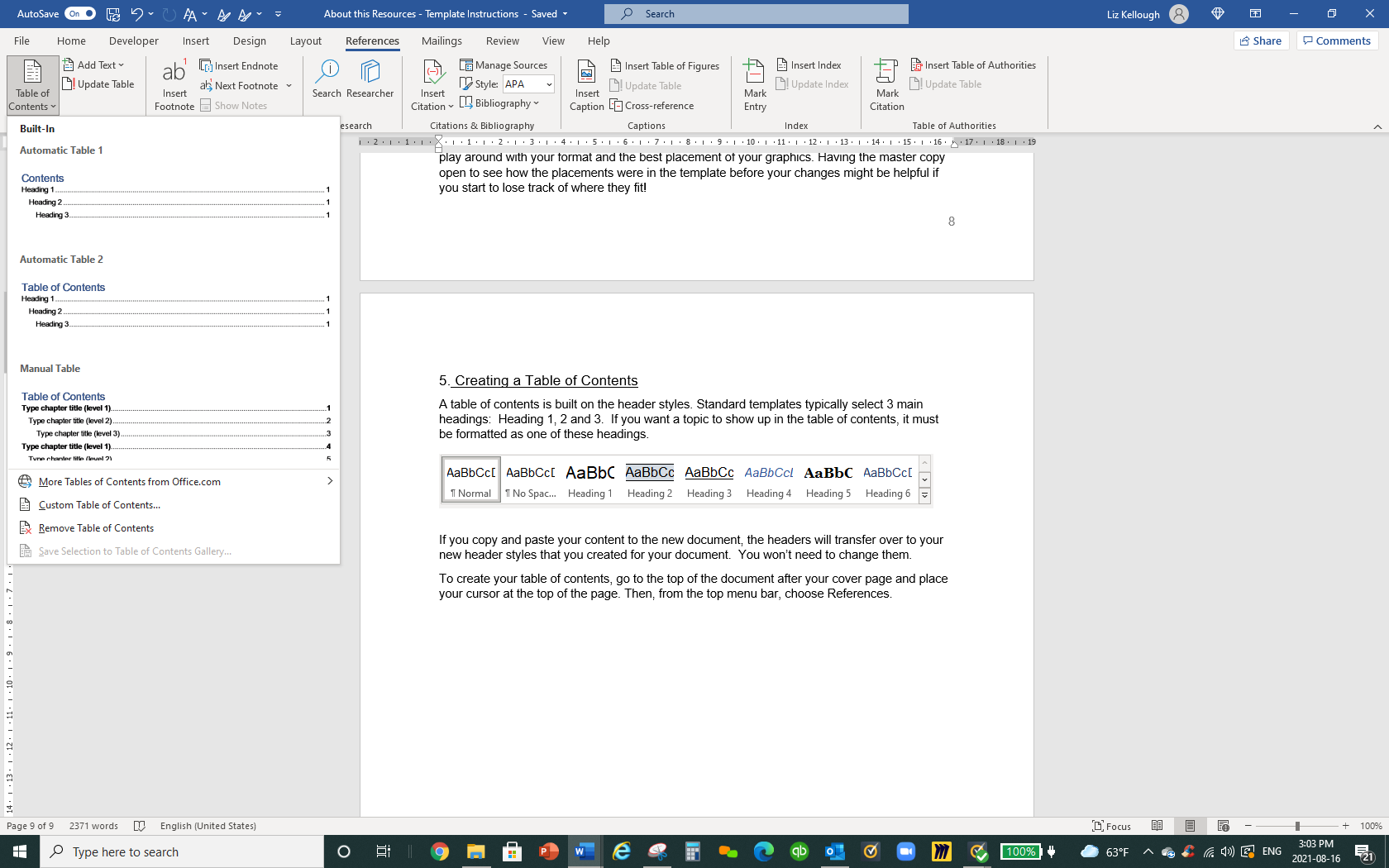
Moving and changing graphics can be finicky but well worth it in the end. Give yourself time to play around with your format and the best placement of your graphics. Having the master copy open to see how the placements were in the template before your changes might be helpful if you start to lose track of where they fit!

#### E. Creating a Table of Contents

A table of contents is built on the header styles. Standard templates typically select 3 main headings: Heading 1, 2 and 3. If you want a topic to show up in the table of contents, it must be formatted as one of these headings.

If you copy and paste your content to the new document, the headers will transfer over to your new header styles that you created for your document. You won’t need to change them.

To create your table of contents, go to the top of the document after your cover page and place your cursor at the top of the page. Then, from the top menu bar, choose References. You will then be able to select Table of Contents from the far left.

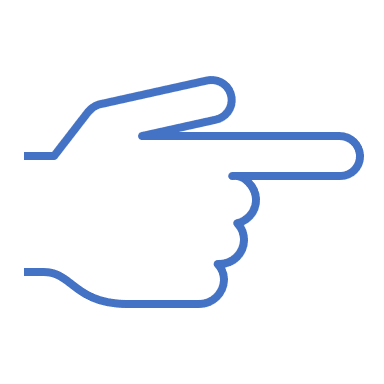


The easiest choice is to select the Automatic Table 1 or Automatic Table 2.

These find and automatically add all your formatted Heading 1, 2 and 3.

#### F. Proofreading Your Final Product

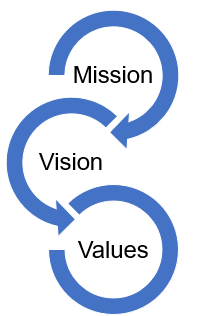
Once you have completed all steps above your new handbook should be ready for someone else to proofread. It is likely best to have several proofreaders who can go through the document to catch all the details that may have been missed or misplaced. Having been immersed in the design, you may not be able to catch these yourself!



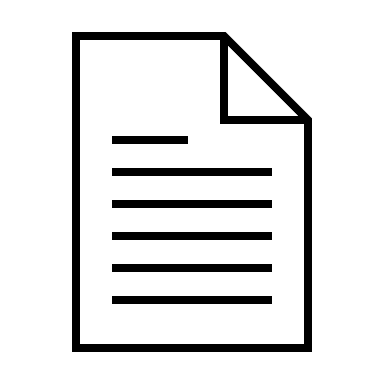
**Helpful Tips**

There are many great YouTube tutorials you can use if you get stuck working with this template and getting MS Word to cooperate. Google your question and you are sure to find others who have solved the problem you are encountering.

## 4. Suggestions for Additions to this Template

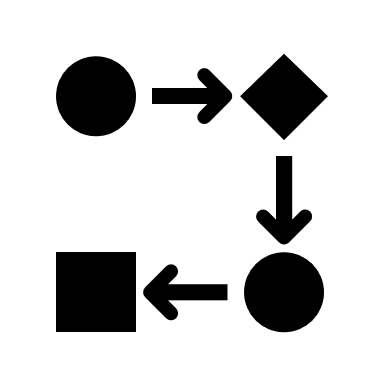
Our reference groups contributing to this handbook had some great ideas about additions they plan to make to the handbook to enhance the content and ensure it reflects their organization. The following is a list of these, and other ideas we think would be helpful to consider when designing your handbook. Be creative and make the most of this resource so it becomes a dynamic working document that works well in your service:

* Include your organization’s mission, vision and values and any other information that assists with contextualizing the home share services.
* Create a space to include names, phone numbers and other information (best times to contact or other relevant info) for resources you use regularly – these could be placed in one place or at the end of chapters



Forms We Use

* Add a section with a list of links to all the forms you use – again this could be at the end of each chapter or at the very end but divided into the stages where they are most often used

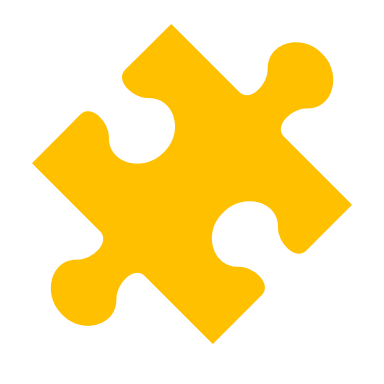


* Create your own visual workflows that match the different chapters so staff can see at a glance the processes/work flow you use to complete the tasks outlined in the handbook – You can build on some of the flow charts already included or develop your own that better matches your own internal processes.
* Come up with and use scenarios that are relevant to your organization for the different sections of the handbook to add depth to these sections. Leaving space in the template to add more examples of situations as you encounter them can be a good way to keep the handbook relevant and to encourage reflection on and learning from them
* Add a section for Notes at the end of each chapter to encourage adding to this resource.
* Talk with your team about other ideas.

Be creative – make it work for your organization!

Now, on to the beginning of the template

**Chapter 1**

****

**Introduction to**

**Shared Living/Home Share**

**as a Service Model**

# Chapter 1: Introduction to Shared Living/Home Share as a Service Model

## 1. The Philosophy of Shared Living and Shared Lives

### A. The Importance of Home

When we think about home, many emotions are stirred. At their best, our homes meet our need for safety, security, and comfort. They provide a landing place that can help support connections to our neighbourhoods and communities. Our homes are where we hope to find an assured welcome and a sense of belonging reinforced by familiar rituals, people, and things we value.

These needs and expectations of home are the same for all of us. However, for some individuals with developmental disabilities, the yearning for familial relationships and stable homes are often more poignant and may have remained unfulfilled. This can be particularly true for those individuals who have survived institutions, or who have been separated from their families for other reasons.

Shared living or home share can offer the opportunity to have these deep and intimate needs met. 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 resiliency of the homes that they reside in – we must nurture the fullest sense of home with them and for them.

Community Living BC (CLBC) provides a range of supports and services to eligible adults and their families including a variety of residential options. Shared living can sometimes be funded through other government programs. [name of agency] contracts with CLBC (and sometimes with other Funders) to provide Coordination of shared living. This resource focuses on providing guidance to you in your role as a [Coordinator or Manager] of our shared living arrangements.

### B. Shared Living in BC

Shared living, for the purposes of this handbook, is a residential option in which an adult with a developmental disability [name your target population if broader i.e. individuals with an acquired brain injury] shares a home with someone who is independently contracted to provide ongoing support. The home is the primary residence of both the individual receiving supports and the person(s) providing them. Shared living has emerged as the preferred residential model funded by CLBC and is typically called home share. While CLBC still retains the option, on an exceptional basis, to directly contract with home share providers, in the past two decades the trend has been to actively recruit qualified agencies like [name of agency] to recruit providers and provide coordination, support, and monitoring of these residential arrangements. At present, there are about 4000 people who reside in shared living arrangements in our province.

Shared living has shown dramatic growth throughout British Columbia over the past 20 years. This growth has presented unique challenges, opportunities, and increased expectations for agencies like ours that coordinate these services. Coordination is complex work and those in the role are accountable to multiple people. A fundamental responsibility is first to the individual served, and their family when they are involved. You are also responsible to support our contracted providers, attend to the requirements and accountabilities that [name of agency] has established, and meet the contractual requirements assigned by CLBC. In this dynamic area of service, 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.

Shared living can be organized in a variety of ways and is typically referred to by our agency as [term used e.g. home sharing, shared living].

In some situations, the shared living provider’s family lives in the home and welcomes the person into share their space. In others, the provider joins the individual as a roommate in a home owned by the individual or their family. Sometimes a person has a semi-private suite in a shared living provider’s residence and in other situations support staff are added to the mix to assist the provider during the day. Some shared living situations involve a great deal of support to the individual, including personal care and medication administration. In others, the individual may be very independent and come and go to work and/or community activities on their schedule without needing much in the way of direct support.

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 people with developmental disabilities to live a full life as contributing members of their 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 involves more independent relationships and members of the household generally go their own ways, coming together at specific times or for specific purposes.

### C. The Core Principles and Values that Underpin Shared Living

In B.C., shared living, and the different options that exist reflect a shift from other models which were the norm over the years including proprietary care facilities[[1]](#footnote-1) and staffed group homes. More specifically, shared living is meant to promote a principled and aspirational vision; a real community life, lived with others, and where citizenship, belonging, and a rich quality of life for people with developmental disabilities are championed and actively promoted.

That means that as a [Coordinator or Manager], your role in shared living is much more than a job, completing a set of tasks, or the offer of a bed. The primary intention is establishing a long term relationship that serves everyone’s needs. Shared living is, at its best, supporting a mutual commitment to sharing lives and creating a home together.

Core principles that guide the work of Coordination, and must inform the supports offered to individuals we serve are:

* Support is provided in a manner that respects the individual’s right to make choices, lead planning, and direct their services and supports.
* Services are regularly reviewed and appropriately adjusted to meet the evolving needs and preferences of the individual.
* Individuals are treated with dignity and respect, and their self-determination is supported.
* Individuals have the opportunity to participate in valued social roles, experience the

rights of citizenship and contribute to community in a personally meaningful way.

* Religious, cultural, and/or lifestyle affiliations and traditions are respected.
* Individuals live in safe and welcoming homes.
* Privacy is safeguarded, including assurances of personal areas.
* Individuals have the opportunity for personal growth and skill development, defined by their goals and needs.
* Family, friends, and members of the individual’s personal network are welcomed by those providing support, and their involvement is encouraged.

These core principles align with the rights which are protected for all persons served by [name of the agency] and reflect our Code of Ethics which have been developed to guide your professional practice.

[insert links to your rights statement here] [insert links to your Code of Ethics here]

## 2. An Overview of Your Role as a Coordinator Manager

### A. The Role of Coordinator/Manager

As mentioned earlier, your role as [Coordinator or Manager] is complex. You are responsible for:

* recruiting and confirming suitable, qualified providers,
* engaging in a discovery process with individuals with developmental disabilities to understand their wishes, needs, and lifestyle preferences, and,
* matching, monitoring, and supporting the relationships you create.

Your role requires maturity, experience, discretion, and an array of competencies. You will alternate between interviewing, monitoring, leading person centred planning, locating resources, and managing contracts and performance, switching between responsibilities as required.

Some of the competencies which we have learned support success in your role include:

* A breadth of experience in the community living sector and relevant post-secondary education
* A strong, values-based approach to supporting individuals including experience and commitment to the principles of person-centred planning and services
* A clear understanding of formal and informal safeguards
* Strong communication skills, including well-developed conflict resolution approaches
* Flexibility and creativity, with an emphasis on a solution focused approach
* Strong writing skills and clarity regarding the importance of documentation
* 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 yourself (representing our agency), the contracted provider, the individual, and their support network
* Excellent interviewing and assessment skills with which to explore motivations and learn about prospective home share providers
* Critical analytical and observational skills
* Knowledge of relevant CLBC policies and reporting requirements as well as accreditation standards, [if relevant]
* Successful completion of Home Study Certification training and other content relevant to your role.

The responsibilities and accountabilities are tied to the quality of life of the person served, safeguarding their health and wellbeing, and gracefully guiding the success and stability of the partnership between the contracted provider, your obligations to the individual and their family, and the professional expectations of our agency.

The current job description for your position is as follows:

[provide a link to the job description or add as an attachment]

Your job description will be reviewed and revised according to the policy and practices of our agency. Please feel free to make suggestions to your supervisor to support the process of keeping the scope of your responsibilities as accurate as possible.

Our agency is accredited by [name of accrediting body]. They have created standards that we must meet to remain accredited. It is important that you also make yourself aware of the standards which apply to the provision of shared living and ensure that your practice is compliant with those as well. We will be discussing accreditation and other quality assurance activities later in this manual/handbook.

### B. Organizational Structure and Supports Available to You

[link to organizational chart]

Shared living is one of a variety of services provided to individuals with developmental disabilities by our agency. These include: [description of other services, if applicable].

Shared living is part of the [team or department]. The reporting relationship for your position is [designated leader] and regular supervisory support is provided through both team and one-to-one meetings.

Who is CLBC? CLBC is a provincial crown agency created under the Community Living Authority Act. CLBC provides oversight and funding to support adults with developmental disabilities and their families in British Columbia. CLBC funds most of our Shared Living services and is responsible for ensuring that our organization meets the expectations associated with Coordination responsibilities.

The Coordination role is part of a funding agreement., typically with CLBC but sometimes via other government Ministries. This agreement provides expectations about the numbers of people who you are expected to support in your role. This can shift a bit one way or the other depending upon who we are serving, their needs, and how we plan and organize oversight. [The current Coordinator “case load” is 25:1 in 2021].

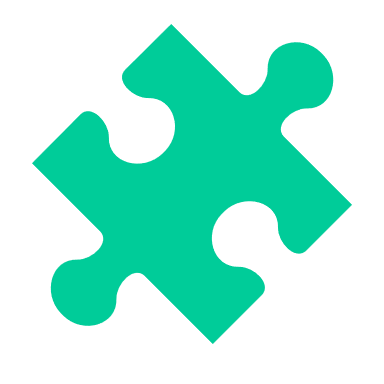
This diagram illustrates the relationships between all stakeholders who are part of a shared living arrangement and emphasizes that the heart of our work are the individuals we support,

Given the complexity of your role, it is vitally important that you not work in isolation. Rather, we want to insure you receive support from your [designated leader and/or members of the Home Share department team]. These organizational supports are essential to supporting your practice, providing guidance as needed, and maintaining the responsibilities to the people we serve in home share.

The following chapters provide guidance on the expectations of your role, processes you should follow, and act as a safeguard to manage the responsibilities associated with the [Coordinator/Manager] position.

### C. How to Use this Handbook to Support Your Role

This Handbook is both your reference and a resource that should be regularly reviewed and amended in response to any changes in your practice. It is meant to be a living document that supports the orientation of new staff, reflects your current practices, and standardizes the delivery of shared living supports. We have designed it with notes pages incorporated after each section to encourage you to add helpful reminders and resources that will support your role and responsibilities. You are encouraged to discuss different sections in your team meetings, identify areas where you feel the Handbook needs to be added to, and propose those to your [designated leader] as part of the regular updating of this resource.

**Chapter 2**

**Initial Engagement with Individuals Seeking Home Share Services**

# Chapter 2: Initial Engagement with Individuals Seeking Home Share Services

## 1. Understanding Who Might Seek Our Home Share Services

People seek our Home Share Services for a variety of reasons. Individuals and/or their families/personal networks may seek us out at different times for different reasons :

*Many individuals that are referred may not be familiar with this service model. Others may have home share/foster care experience already with another service provider but not know anything about our organization. We need to make sure they are oriented to both.*

## 2. Responding to Service Inquiries/Referrals (Non-Crisis Referrals)

Before we can get started with any form of intake, individuals inquiring about our Home Share services require prior funding approval from [Name funders]. While most inquiries will be from pre-approved individuals, some may be exploring a variety of residential options before seeking funding and may come to us to find out about our Home Share Program. The chart below shows the route we follow based on the type of inquiry.

**Clarify Status**

No funding yet. Exploring Home Share among other residential options

Pre-qualified & referred by funder to explore our services among other Home Share Services

Funding approved for our service through a direct referral from funder – contact made by funder not individual.

Provide contact info for funder & details about pre-qualification process if they want to pursue Home Share

Engage with the individual in an initial exploration of their understanding about Home Share and its fit for them and what they can expect in choosing to find a Home Share arrangement with us.

Assess our capacity to serve individual based on funder information & then proceed with meeting the individual or inform funder we will not be proceeding and the reasons.

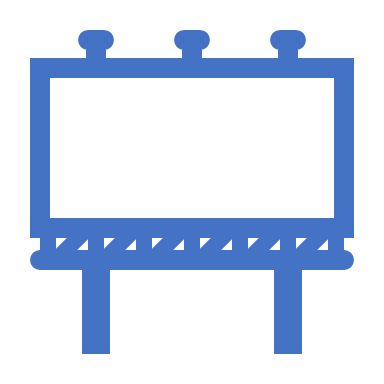
Crisis referrals

See section 6 - Consult with leadership

Note: This initial response and engagement of the individual in learning more about our service is not a confirmation we will proceed with services. This is the exploratory stage for both parties to decide if we want to proceed with a formal intake where we will decide together whether we have the capacity and they want to move forward with finding a Home Share. Some may still need funding approval before we proceed.

### A. Setting the Tone for All Inquiries/Referrals

Establishing an open, honest, and respectful relationship with each individual and their family/personal network (as appropriate) when they come to explore this service option with us is key to setting the tone for a positive home share experience and helps confirm if a decision to move forward should proceed. Individuals who are either referred or self-refer to Home Share may come with a range of experiences and perceptions about Home Share, and about our organization. It is critical that we learn about these along with their hopes, needs, and expectations so that we can explore both the suitability of this residential option with them and the ideal home share environment for them if our Home Share model is determined a good fit. Our focus is on ensuring that we help people make an informed choice.



**My**

**Hopes**

### B. Engaging with the Individual to Explore this Service Option with Them

It can be easy to feel a sense of urgency in this process, especially if you are feeling the individual is anxious to get on with finding a Home Share. However, it is essential to go over key elements of this service model to be sure individuals and their families/personal networks have enough information to make an informed decision about whether to move forward with a formal intake.

#### Resources/Information to have ready

* Up to date brochures/information packages about our organization
* Up to date [Home Share Participant Handbook]
* Handout - Rights/Responsibilities for the individual/family to disclose necessary information (if not in your handbook)
* [CLBC Guide to Individual Preference](https://www.communitylivingbc.ca/wp-content/uploads/2018/02/A-Guide-to-Individual-Preference-Oct-2013.pdf)
* Our [intake package] including consent forms that they will need to complete if they want to move forward with intake.
* Information about our current timelines for finding home share arrangements that can help individuals and their families/personal networks understand the variation in time it might take to find them an appropriate home share situation. Specific data is better than a general statement. Use times from the last 3 or 4 successful matches to give a clearer sense of potential timelines.
* Examples of Individual Profiles\* (fictitious) that help the individual start thinking about their preferences and needs in a Home Share situation so they can evaluate this option
* Link to the CLBC video to show an example of a home share arrangement <https://www.youtube.com/watch?v=-1uHRLVvST8> or our own example.
* Names of individuals we support in home share who have agreed to talk with others about their experience or host a visit with their provider. These should only be provided if this feels like a good next step for the individual. Then select a possible candidate and consult with them first to see if they are open to a facilitated discussion. Never share contact information with the individual. Make the initial introduction by phone/video conference and then leave them to talk in private.

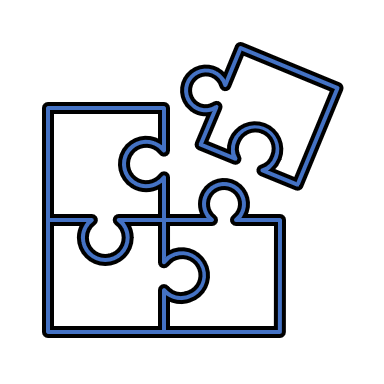
#### Discussion Points to give the individual a clear sense of this model and our practices:

| Discussion Point | Intention/Expected Outcome |
| --- | --- |
| * About Home Share   - the difference between Home Share and other residential models and  - the types of shared living arrangements we support (Home Share Provider’s home, your home with someone sharing your home to provide the support you need….other?) | * The individual has a good understanding of how shared living can work and the ways in which it might work for them |
| * The importance of knowing what you want and finding a good match | * The individual is clear that our focus is on finding a good match and how important it is for them to be thinking about what is both important to and for them so this can happen |
| * Making a good match takes time but is worth it! Use stories and your stats around how long it can take and why it is important | * The individual is prepared for and understands a match may take time and that there is a possibility no match can be found. |
| * Our role helping to facilitate and monitor each match – what we need to know to help us make a good match and how we support you and your home share provider while you are sharing your lives together. | * The individual is clear about our role as the Home Share service provider and our ongoing involvement throughout their home share experience. |
| * Your rights and responsibilities in finding and maintaining a Home Share arrangement that works for you | * The individual understands   + their role in providing all relevant information to help us in making a match,   + their right to choose and/or decline any of the potential Home Share providers we suggest, and   + their ongoing rights and responsibilities living in a shared living arrangement |
| * Our intake process and how intake decisions are made | * The individual is aware of the steps involved in our intake process and that:   + they can always decide not to continue at any stage – we will check in with them regularly to be sure they are still wanting to continue,   + we may make a determination that we do not have the capacity to meet their needs and/or requirements as we start to learn more about them |

#### Sample Questions to explore the individual’s and/or their personal network’s understanding and expectations of Home Share:

It is important to get a sense of what the individual already knows about Home Share and why they think it might be a good fit. At this stage, you are gathering initial information to help inform both you and the individual if it will be a good fit. You will complete a more detailed exploration with them if you both agree (and the funding has been approved) to proceed with intake.

* What do you know about home share? What makes you think it would be a good option for you?
* What are you looking for when choosing a home environment? What are 5 things that matter the most?
* Home Share involves living and sharing a home with other people. What have you liked about living with others in the past? What don’t you like and how have you dealt with that?
* What are your support needs that you will count on your home share to provide?
* If you have lived in a Home Share or Foster Care arrangement before, what happened to end this arrangement? What did you learn from that experience that you can take into a new Home Share arrangement?



Intake Form

Funder

Info

Plans

Personal

Profile

for

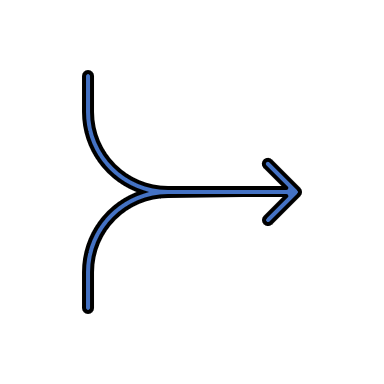
Home Share

Assessments

## 3. Proceeding with Intake (Non-Crisis Referrals)

Once the individual has confirmed their interest in proceeding with the intake process, and confirmation of the funding allocation that has been approved, you can invite the individual, along with their family/personal network, if they choose to include them\*, to meet with you to get started. The intake package and our discussions together will help us to further assess our capacity to support the individual in a home share arrangement. Once our capacity is established, the profile and vulnerability assessment will also serve as the primary tools for facilitating a match with an approved Home Share Provider.

Plans, Risk Assessments, Other Assessments, Health Care Plan etc. from Funder/Other Sources



Consent

Forms

Intake

Form

Personal Profile for Home Share

Home Share Vulnerability Assessment

### A. Completing the Intake Package

*The questions may feel intrusive to an individual or they may be confused about what is needed. Always make sure to provide the context for the questions and how* *it helps with finding a Home Share Placement that works.*



Some individuals may choose to complete the intake package with you as part of your initial meeting together while others may prefer to take some time to complete all or some of the forms independently and/or with their family/personal network and return them to you. It is important to offer the various choices so that you are modelling our program’s commitment to supporting individual choice and control. If you feel an individual may struggle to complete the forms on their own but they want to do it themselves, simply make sure to let them know that when they return the package you will spend time with them reviewing what they have completed to make sure you have a good understanding of the information they have provided.

In either case, it is important to review the forms with them and the reason/purpose for gathering the information on each.

Consent Forms – [Name of Consent] forms should be signed by the individual and/or legal guardian to allow for exchange of information with any and all of the following relevant people/services involved with the individual as appropriate:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| * previous and current service providers | * family members | * members of the individual’s personal network | * school personnel | * doctors and other medical professionals | * funder |

The selection of people/services will be different for each individual based on the level of engagement the individual has with each and how they can help to inform the level of support and type of home share arrangement the individual might need.

Intake Form – Our [Name of Intake form] is used to gather initial information about the individual that can help guide our planning. [ Add details of the intake form or other type form you use that gathers personal information about the individual.]\* Note…if it is combined with the personal profile below, you can remove this section

Personal Profile for Home Share – The profile form helps to drill down into various aspects of home life to help the individual think through what is important for someone to know about them if they want to share their home with them. [ Add details of the profile form or other type form you use that engages the individual in thinking through their preferred lifestyle, the important to and important for in relation to their home environment etc.] See examples in resources.

Whether you are completing the form with the individual or reviewing their completed form with them, be sure to take time to explore each area with them. This is not a ‘form filling’ exercise. It is a chance to really learn about and understand the individual and what matters to them. 

* Make sure they know that this is the time to be really honest and forthright about what they need and want. There are no wrong answers. Emphasize that the more they are clear about their preferred lifestyle and what works and doesn’t work for them the better.
* Be curious and open to what they have to say, without judgement.
* Don’t take things at face value. Dig deeper so you get a better understanding about what they mean and how it might impact their choice of living situation. Good prompts are, *“Tell me more”, “What do you mean when you say….?”, “How would others know you felt that way?”*, “*What happens for you when someone crosses that line?*”, etc. as ways to gather more information and to get a clearer picture about what they mean.
* Use examples to help them understand the info you are seeking
* Give time for them to reflect on their responses. The profile does not need to be completed or reviewed in one sitting. Go at the pace that works for the individual.
* Come back to the profile as you get to know the individual. Talk with them about things you are noticing matter to them or that you have heard from others and check in with them about whether to add it to their profile. This profile should include all information that you will be sharing with prospective home share providers as part of the matching process so be sure to review and add to it throughout your time getting to know the individual.

This may be the very first time an individual has thought about what they want, having never been asked about these things before. They may need time to think things through.

Note: If their family or others are part of these conversations and tend to speak for the individual, be sure to draw in the individual’s input too by asking them directly i.e., “*What do you think, Larry? Is that how you feel too? Anything we missed? etc.”*

### B. Building a Complete Picture- Other Relevant Information, Plans and Assessments

In addition to the intake package, it will be important to gather information from other people /services that form part of the individual’s support system to be sure we have the capacity to address identified support needs and/or the life goals and expectations of the individual.

Eligibility and Service Allocation Information – As part of pre-qualifying the individual, the funder will have done their own assessment of the individual’s needs that has helped them establish the funding levels and types of service/supports the individual will need. If this level of detail was not included in the referral package you received, it will be important to follow up with the funder to either get a copy of the assessment they completed and the profile/plan they developed. If the funder has no formal documentation to share, see details in the end of this Section- Section 2A Q& A.

Health Care or Other Care Plans – It is important to find out if the individual has any health or other types of care plans that have been developed for them, either through other services they are currently accessing or that the family or current caregivers have developed to support the individual.

Risk Assessments/Behavioural Support Plans – If there are already plans in place for the individual related to risk and/or behaviour, these must be accessed to help better understand the individual’s risk to themselves or others and the level of and type of supports they might need to enjoy a good quality of life in a home share.

Person Centred Plans/Quality of Life Statements – It is equally important that we gather and review any person centred planning information about the individual. This could be a formal plan with goals or a quality of life, vision statement, or other document that shares information about the individual’s dreams and aspirations.

Recent Incident Reports/Police Reports/Other Information– Any recent, relevant reports on file about the individual should be gathered and reviewed. These types of reports inform our planning by helping us to better understand the issues/challenges the individual experiences and what supports are needed to assist them.

### C. Completing a Vulnerability and Safeguards Assessment

As part of intake, you will be responsible for compiling information gathered, and collaborating with the individual and/or their support network as appropriate, to complete a vulnerability and safeguards assessment. This assessment flags key areas in the individual’s life that require specific attention in order to ensure safeguards are in place to support the individual’s quality of life and ensure their health, safety, and wellbeing. [ Add details of the vulnerability assessment form or other type form you use that explores the areas where the individual may require specific attention to the development of safeguards to reduce their vulnerability in key areas of their life.]. Typically this assessment is initially completed at intake. The assessment helps us in developing a home share arrangement by highlighting the specific qualities of a potential Home Share Contractor and can ensure that safeguards are in place to help mitigate any vulnerabilities identified.

It is important that this vulnerability and safeguards assessment be completed with others on the individual’s team/life in order to make sure all the pieces of information that people hold are included. This approach also helps to ensure that the safeguards, including natural supports that are working for the individual, are documented. Knowing about these safeguards, and how they serve the individual, is especially important when they are making a transition to a new home. Part of planning will need to factor in how to ensure these continue to be maintained and/or replaced if they will no longer be viable in a new location.

To support the individual and family members to contribute to this assessment, it can be helpful to use the CLBC resources, [Belonging to One Another](https://www.communitylivingbc.ca/wp-content/uploads/2018/02/Belonging-To-One-Another-final.pdf), [Addressing Personal Vulnerability through Planning](https://www.communitylivingbc.ca/wp-content/uploads/2018/02/Addressing-Personal-Vulnerability-Through-Planning.pdf), and [Responding to Vulnerability Discussion Paper](https://www.communitylivingbc.ca/wp-content/uploads/2018/02/Responding-to-Vulnerability.pdf). These plain language versions help to frame the types of vulnerabilities people may encounter and some ways to think about safeguards using stories to help bring them to life. See more details about Vulnerability Assessments in the section on Monitoring and Support for Home Share.

### D. Confirming Understanding of Our Service

Before moving on to make a final decision about our capacity to support this individual in our program, it is important to confirm their understanding of our service. If, as part of the initial service inquiry, you did not have time to do an in-depth review of the service before starting the intake process, be sure to follow the steps above under “Engaging with the Individual to Explore this Service Option with Them”. In particular, if they have not had a chance to talk with others or visit a Home Share to learn more about this service model, be sure to set this up so they have a more concrete understanding about what it might be like before moving forward with an intake decision and signing our [agreement for service] that will allow you to proceed with finding a potential home share arrangement.

## 4. Making an Intake Decision

Final intake decisions must be made in collaboration with our leadership. Our focus is not to turn eligible individuals away who are motivated and keen to move into a home share situation, but to ensure that the service model is the right one for them and that the supports and resources that are made available will be conducive to a successful long term arrangement. With that in mind, based on all the information gathered through the intake process, and your recommendations about program capacity, the [Name of Leadership Position] will:

* Review the information and request any additional information needed to assess [Name of agency]’s capacity to meet the needs and expected service outcomes within the scope, mandate, and available funding allocations for the service request.
* Negotiate, if needed, with the referring Funder or family/legal guardian to address any additional resources required to provide the type and level of service needed for the individual to be effectively served. This may include additional staffing, staff training, or other internal/external resources. Note: All professional, medical, and financial supports may not be in place but must be requested and, a decision to resource or not must be confirmed prior to final determination.
* Contact the funder, if they determine [Name of agency] cannot proceed with the individual and the reasons for this decision.

## 5. Informing the Individual about the Intake Decision

Once a decision has been confirmed, you are responsible to:

Not Approved

Explain reason for decision

Suggest alternative services to address their needs and expected outcome.

Provide info about their right to appeal along with our [Complaints Brochure]

Contact the individual directly to confirm the intake decision

Approved

Confirm *Agreement for Service*

Yes

No

Check in to see what has changed their mind

Proceed with next steps.

Document the decision, your conversation and actions taken on [Org case management system] .

Follow-up in writing with the individual confirming the decision, rationale, and action taken cc Funder

#### When an Individual Chooses Not to Proceed

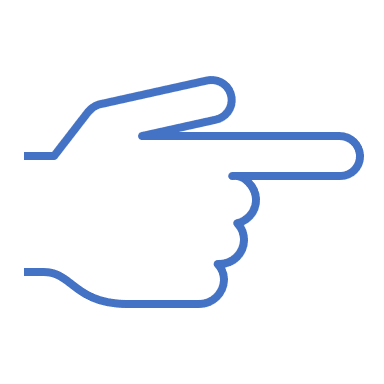
When an Individual has made a decision not to proceed with services, it is important to respect their choice. Our role is not to convince them otherwise but to learn about the experience for them and what prompted them to decide that either Home Share or our program is not a good fit. In some cases, they may need more time to explore this option and are not ready to commit. In other cases, they may have clear reasons why they are backing off. No matter the reason, taking time to confirm their right to make a good choice for themselves is important. They should be acknowledged for thinking it through and letting us know. Choice is critical to the success of this model and a core value of our agency.

#### When [Name of agency] Chooses Not to Proceed

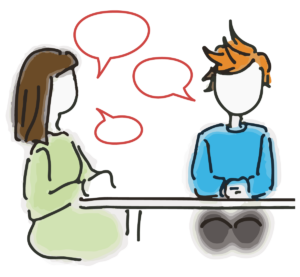
It will likely be rare that we find we are unable to accommodate individuals with whom we have proceeded with intake. There may be times however, that the flags raised as we get to know them and/or our history of finding home share providers who can meet certain types of needs, will prompt us to decline service for an individual.

Telling the individual we aren’t going to be able to serve them will likely come as a blow even if we have been clear from the outset that there are no guarantees. They will typically have some form of negative response whether that be disappointment, frustration, anger, or anxiousness etc.

Our focus must be on framing the information in a way that helps all involved to see this decision as a proactive one that will support the individual to find a better option that can more appropriately meet their needs and expectations. The following tips can help you preplan your conversation so you:



**Helpful Tips**

* Thank them for taking the time to explore the potential for Home Share with you and make note of anything special about them that you appreciated.
* Remind them that we want what is best for them and after looking at their needs and what they hope to have in a home, [Name of agency] does not feel they can meet their needs in a way that will work for them.
* Talk about other resources that might be a better fit
* Explain that you will be talking with their funder about these other options
* Encourage them to go back to talk with their funder so they can find the right fit for them.
* Tell them they have the right to make an appeal and that you will send them a copy of the Complaints/appeal process if they want to appeal our decision.
* Thank them again and explain you will be sending this detail to them in writing.

Go gently. Be prepared to listen to them and acknowledge the feelings. Reinforce the importance of talking with the Funder to explore better ways of meeting their needs.

## 6. Responding to Crisis Referrals

### A. Internal Crisis Referrals

There may be times that an individual we support encounters an emergency situation that requires some form of immediate response. Examples of potential situations include:

* The current Home Share Provider experiences a health crisis and ends contract
* The individual has a health crisis and cannot return to their current living situation
* The home share arrangement breaks down and is no longer available to the individual

In these cases, we will already have a relationship with them and will proceed with finding temporary respite and/or exploring a long term arrangement with a known provider as outlined in the section on *Managing Crises that Impact the Stability of a Home Share* in Chapter 5. .

B. Crisis Referrals from Funders

*Stepping back and taking the long view is a key to responding to crisis referrals. We can inadvertently do more harm than good by leaping to find a placement for an individual who we later find out needs a higher level of care than we can provide.*

While [Name of agency] is responsive to supporting individuals in crisis to find a Home Share match if feasible, and will do our best to make this happen, Home Share Coordinators/Managers are under no obligation to accept a crisis referral and therefore should not make any promises to a funder. Our focus in responding to crisis referrals will be on ensuring temporary arrangements can be made for an individual in order to take the requisite time needed to develop a long-term arrangement that is the best match for the individual and the provider.

It is essential that we do not move too quickly to respond to a crisis. An inappropriate or incomplete matching process can not only have a detrimental impact on the individual we are trying to support but could seriously undermine our relationship with any providers we involve. New or long-term providers may back away permanently from considering home share as a lifestyle choice based on an unsuccessful experience that we have encouraged them to accept.

Responding to crisis referrals should always be handled in conjunction with agency leadership [Name of Leadership position].

Three key factors guide our response to each crisis referral:

1. The level and types of needs of the individual must be within the scope and capacity of our services. This means we must have enough information about the individual from the funder in order to make an informed decision about whether to proceed with an intake exploration based on the complexity of the individual’s needs and our skill set/mandate. Note: If the individual is being referred from a different community due to lack of options where they live, we can anticipate significant upheaval for the person that will require additional resources to assist them to adapt to their new community. Consideration of the transition process is vital, otherwise, the likelihood of failure is high in these circumstances.
2. There must be availability for a temporary arrangement for the individual. Either we must have
   1. potential to arrange a short-term arrangement with an approved provider that can meet the identified needs and preferences of the individual while we proceed with finding a long term arrangement following our standard procedures. It is vital that we do not take shortcuts in our desire to resolve a crisis situation. or
   2. the funder will need to make arrangements for a temporary arrangement.

In either case, we need to make sure the funder understands that we will not shortchange our best practice approach and will proceed with our typical comprehensive screening and intake process in order to make an informed choice about our capacity to serve and follow through with a Home Share for the individual.

1. We may determine, based on the temporary arrangement and/or our intake assessment and planning with the individual, that we cannot proceed with a long-term match and will inform the funder that they will need to seek an alternative long term arrangement.

#### 1. Determining the Level and Scope of Needs of the Individual

It is imperative that the Coordinator/Manager gather sufficient information about the individual and the resources available to them in order to make an informed decision about the organization’s capacity to:

1. Determine if they fit within the scope and capacity of the services we offer, based on their complexity of needs.
2. Ensure the funding allocation and other resources match the level of need and are in place to support the individual through a transition from a temporary to a long term home share arrangement. This may mean extra staffing support, training/resources to support the temporary and new long-term provider, extra professional resources to support the individual.
3. Find, as needed, temporary housing with an existing pre-approved provider that can meet the needs of the individual over the short term without compromising the health, safety and/or well being of the individual or others in the.
4. Take the time needed to follow through with best practice procedures as outlined in this manual to find a long-term match for the individual with a Home Share Contractor if it is determined we have the capacity.

#### 2. Arranging Temporary Housing

Where possible, this should be the role of the funder unless the individual is someone we already serve and support and know we can find an interim, qualified provider.

In cases where the funder has limited means to house the individual beyond a finite time frame and is seeking our support for a temporary/respite service, they must provide a comprehensive profile of the individual and their needs. This must be accompanied by the necessary funding allocation and other resources in order for us to explore potential options through our [list only those that apply]:

* Respite Services
* Existing complement of pre-approved providers
* Recruitment efforts
* An arrangement in one of our group homes

As part of our response [Name of Agency Leader] may ask the Home Share Coordinator to explore any options with pre-approved providers and/or through our program recruitment process. If options are found, the decision to go with a specific provider for this type of arrangement must be done in collaboration with [Name of Agency Leader].

#### 3. Moving Forward with Screening and Intake Decision Making

Once temporary housing has been found for the individual, our standard screening and intake process can be used to start developing a more in depth understanding of the individual and to proceed with exploring capacity and options for a long term home share arrangement. It is important to remember that we do not want to take shortcuts or shortchange this process. While we can take advantage of the information already gathered about the individual, taking time to get to know them better while they are in the temporary housing situation will provide a wealth of important information to help guide our exploration of options for the individual and the ways in which they can best be supported.

#### 4. Proceeding with an Intake Decision

Finally, like with all new referrals, once all information is gathered, appropriate levels of funding and other resources have been approved, and the individual has confirmed they want to move forward, the Home Share Coordinator and [name of agency leader] will make a final intake decision. This decision will confirm whether or not to proceed with finding a home share arrangement and/or to refer back to the funder to find an alternate resource following the steps outlined in the section above.

## 7. Chapter 2 – Q& A Screening and Intake of Individuals

While having a framework and guide to follow helps to ensure practice consistency, we know that the ‘best laid plans’ rarely follow a smooth path. There will always be little variations and unexpected issues. The following are some of the common types of situations that can arise:

What if the funder does not provide enough information to be able to decide our capacity?

**Start with relationships**: Make sure you build a strong and positive relationship with your funders. Ensure they understand your commitment to delivering quality services. If you are a new Home Share Coordinator or Manager, take time to build your relationships with the funder’s representatives from whom you will be receiving referrals. Do the same when there is a new funder representative on board. Take time to get to know them and their working style. This will help with communication.

**Be specific about the types of information you need**: Ensure they have written details about what information is important to accompany each referral. Tie this request to quality services and the need for adequate information to effectively assess your capacity to support an individual. Focus on the “Do No Harm” approach for why this information is required.

**Ensure consistency across your program:** Make sure everyone on the Home Share Team is asking for the same level of detail from the funder and following up when this information is not received.

**Be clear about your process if information can’t be provided**: There may be times where the funder has not been able to access the level of information we require. Or deliberately withholds vital information. What about encouraging their own discovery process again in this section? In these circumstances, it is important to let them know that we may not be able to proceed as quickly to find a match for the individual until we take the time to learn about the individual in more depth.

Pay Attention

What if we engage with the individual and/or their network and discover big flags about the individual’s suitability?

**Don’t ignore these flags:** Ignoring importantconcerns or issues that arise while

getting to know an individual, does a disservice to them and to any potential Home

Share Providers with whom you are considering a match. We want to learn as much as we can about each individual in order to make sure we identify the types of resources and support they may need to enjoy a good life. Our focus should not be on whether these concerns make the individual unsuitable or not…the focus is on what will work for them and how we can make sure to factor their health, well being, and safety along with those of the people who may welcome them to share their lives together.

**Involve agency leadership** [Name of position]: Be sure to inform leadership of any flags so they can work with you to explore them in more detail. Part of their work is to help identify the level of resources/support they might need in order to explore how we might make this work within the funding allocation and to negotiate with the funder. Is this where we consider adding in Carla’s point about two people conducting aspects of an assessment?

**Be transparent**: If you and agency leadership are questioning your capacity to serve an individual, be sure to engage them in the conversation where possible so they are not caught off guard. You may find that they or their family/personal network have some ideas or previous experience resolving the areas of concern that can help guide planning. They may also be having the same reservations about this service model that you can then all bring forward to the funder.

**Stay attuned to and refrain from judging this relationship**: Learning about family dynamics, and the role each family member plays in the life of the individual, is critical to finding an effective match for them. Most families have had a lifetime of serving as strong and influential forces in their loved one’s life as advocates who care deeply about the safety and well being of the individual and are wanting the best for them. Our job is to listen and learn while also finding ways to engage the individual in the discussion. This can be more easily achieved if the family feels heard and respected.

**Set a structure to your conversation that allows everyone to have input**: If the individual has chosen to include their family, or the family is the legal guardian, using a circle or round-robin approach can be one way to help everyone join in the discussion. This can be a non-threatening way to shift the conversation and can be introduced as a way to give a chance for everyone to share and to feel included.

**Seek family input for how to best include the individual in the discussion**: Sometimes, if the individual seems reluctant to speak and defers to the family, consulting with the family separately about ways to engage the individual can work well. Perhaps ask about special things they might bring to our get togethers that gives them a focus or host the meeting in their home so the individual can show you around in the comfort of their own surrounding and share the things that are important to them. This is a chance to learn more about ways that the individual communicates particularly if they do not use words.

**Honour the individual’s right to choose if and how to involve their family**: If an individual who is their own legal representative, has indicated a preference to participate independently in the intake process, we should take time to explore how to honour this choice without alienating close members of their Personal Network including the family. Helping the individual to see the value of their Personal Network’s involvement and, to explore alternate ways to include them, can both validate the individual’s choice and at the same time help them to navigate new ways of keeping their family connected. Perhaps spending time with them individually might be one option.

What if the family takes charge of your initial conversations/information gathering and overrides input from the individual?

What if we are struggling to recruit new providers and have doubts about our capacity to meet an individual’s needs or timeline?

**Be Transparent**: It is essential that we not set up the Individual with unrealistic expectations if we already have a sense that it will be hard to find a provider. While we may be pleasantly surprised, and find someone fairly quickly, we should be clear from the outset what our average timelines look like based on our commitment to finding the right fit for the individual.

**Be sure to engage our Home Share Team and other internal resources**: Let everyone know about all new individual and brainstorm together any potential providers. Perhaps there are potential ideas through the network of employees…

**Reach out to other providers**: Be ready to explore options with other providers through our interagency contacts/meetings. Working collaboratively with other providers keeps the individual at the centre of our support and has proven highly effective.

**Explore Respite options to bridge a gap**: Rather than rush to meet a need, and shortchange our matching process, explore our capacity to set up a short-term arrangement for an individual if they cannot remain in their current housing situation until a match has been found. This might involve negotiating with the Funder to extend an existing placement or find a temporary placement for the individual through another resource if we are unable to find one internally. These discussions should be held in conjunction with the [name of designated leader position]

What if the individual says or infers that it is not really what they want but they have no other choices?

**Don’t jump to conclusions, keep exploring**: This may be an important flag but like any flag, it is important to dig deeper to understand what the individual is trying to communicate. They may be worried that it will be too much like a duplication of their current life at home and not allow for the increased independence they may be seeking. They may be unclear about what home share arrangements can look like. Focussing on their preferred lifestyle and what they hope to have in place for themselves can help you more fully understand their reservations without having to abandon this option for them.

**Ensure they understand their right to informed choice**: If the individual is their own legal guardian, be sure that they understand their right to make their own choice about their housing. Explain that our role is to help them make an informed choice and that we like to spend a lot of time up front getting to know them so we can find a good match that works for them. Continue to explore this option with them but check in consistently to be sure they still want to move forward. If they are not their own legal guardian, have this conversation with everyone involved and problem solve your concerns with the individual’s perceived or verbalized resistance to this housing option.

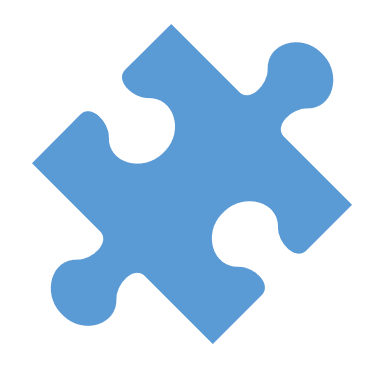
**Name your concerns and problem solve together**: If they are resistant to engaging and/or just go along with what ever is said without offering their input, it might be that they feeling they have no control and are just passively resisting. Talk with others on the individual’s team of support and/or with [name of designated leader position] or fellow co-workers, to explore ways you can help them gain back a sense of control. This might be as simple as making a list of clear questions they can use to interview prospective Home Share Providers. Alternatively, it may mean a major overhaul to the plan involving talking with their Funder about other residential options.

What if the individual has a friend or someone that they already want as their home share provider, and they just want to bypass this exploration and get on with setting up their new home?

**Acknowledge their pro-activity and explain our requirements**: Make sure to acknowledge them for finding someone with whom they would like to share their lives. This shows great initiative and may well work. However, it is important to help them understand our role and the care we take in ensuring a good match and that we would not want to jeopardize a good relationship without making sure it can be successful for everyone. Use stories/examples to highlight the importance of taking this time.

**Focus efforts on this home share arrangement as a first step**: Unless there are major flags related to the individual’s health, safety, or wellbeing in the company of this potential provider, honour the individual’s choice by working in tandem, screening, and assessing this potential provider at the same time as conducting the screening and intake with the individual. Expanding that this will help them move into this arrangement in a more informed way and help them circumvent a potential breakdown of the placement if they find they are not as compatible as they thought. Follow through on all the steps in this section of the handbook for the individual and in the next section for the potential provider. Once you have approved the provider, move forward with the matching process – do they still feel like it will work now that they have read each other’s profiles and understand one another’s expectations? If the potential provider does not meet our standards for approval as a Home Share Contractor, take time to review the reasons with the individual and, with their consent, explore new home share options.

**Chapter 3**



**Initial Engagement with Potential Home Share Contractors**

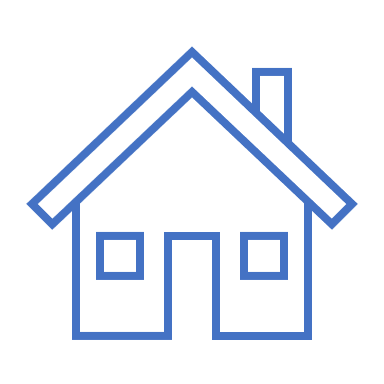
# Chapter 3: Initial Engagement with Home Share Contractors

## 1. Recruiting Potential Providers

Choosing to be a Home Share Provider involves making an important lifestyle choice. Our focus is finding potential providers who are enthusiastic about embracing this lifestyle choice and who are open to and willing to meet the rigorous requirements for this role.

[Name of Org] tries to maintain a roster of pre-approved Home Share Providers from which we can draw when we have a new individual seeking a Home Share arrangement. This pool of providers offers the individual the opportunity to explore a range of choices and see if any of these might be a potential match for them. Having a number of choices readily available is our ideal! To achieve this goal, we continuously recruit providers whether or not we have anyone currently seeking a shared living arrangement.

Options



However, we know that many potential Home Share Providers cannot put their lives on hold for a possible match if none are in sight. They may move on to other opportunities and no longer be available when we need them. This means we are also often in the position of focusing our recruitment efforts for a specific individual, either because we have no suitable pre-approved providers and/or they do not find a match among those that are available.

#### Ongoing Recruitment Efforts

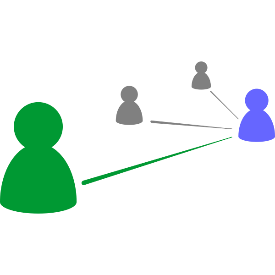
‘Word of mouth’ continues to be an effective recruitment approach that often happens naturally and that we can also encourage among our Home Share Providers and our employees. Having them promote this option to family members/friends, has proven powerful in getting the word out and generating interest. However, it is important that we also take an active approach to recruiting new applicants using more formalized recruitment approaches. When engaging in these approaches, Home Share Coordinators/Managers must follow our policies on the use of media, including social media, and advertising to ensure they meet agency standards.

The following strategies can help to ensure that we continuously get the word out to potential providers:

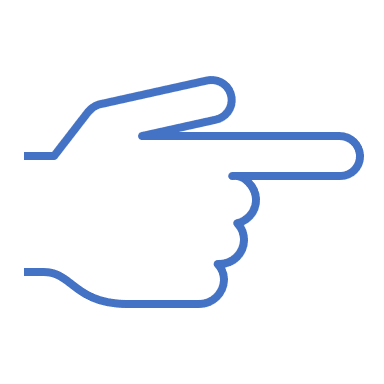
* Maintaining, updating, and monitoring information on our website so that we ensure we have the most current information about our services and the role of the provider, the application process and contact information.
* Engaging our current home share providers in giving us feedback on how we profile/engage visitors to Home Share on our web page and other marketing materials and including their testimonials in our electronic and hard copy program information.
* Maintaining a presence on our social media pages – this can be scheduled as a routine activity (monthly, quarterly etc.). Be creative – If possible, use pictures/stories from individuals and/ or a provider (subject to consents) that highlights something rewarding in their experience with home share.
* Participating in local job fairs or community events.
* Engaging our employees so they know about the service and can promote among their friends/networks
* Promoting through community and faith organizations – cultural organizations, community centres etc.

#### Person Specific Recruitment Efforts

In addition to the ongoing efforts listed above, specialized recruitment for an individual will require a focused effort that is tailored to their specific needs and preferences. Taking time to think through the individual’s profile can help guide how to target recruitment efforts. Possible strategies:

* Engaging with our local network of service providers who may have some names of people who might be a good fit.
* Approaching special interest groups based on the Individual’s hobbies, interests, cultural background, spiritual community, level of care needs etc.to promote through their newsletters or communication systems.
* Putting a call out through our employee communications systems with generic information about the kind of home share arrangement we are seeking based on the individual’s profile – *non-identifying information only*- asking employees to promote through their networks.
* Advertising through formal job sites/local paper with the same information used to engage employees.

Regardless of the media used to recruit providers for a specific individual, the following tips should be included in your approach:



**Helpful Tips**

* Do not name or include any identifying information about an individual,
* Focus on the individual’s interests and positive qualities,
* Identify some of the skills and qualities that are important for the potential candidate to have to support the individual,
* Describe the best environment for the individual based on the profile developed,
* Make sure to include a description of Home Share and the role our organization plays in supporting both the individual and provider and our emphasis on finding the right match for both parties.
* Invite anyone interested to contact our program to find out more.
* Refer them to our website for more information about the role and the requirements of contractors.

## 2. Selecting Our Providers

[Name of Org] uses a four-part process to respond to those who come forward expressing an interest in becoming a Home Share Provider. These include:

* **Stage 1: Initial Inquiries and 1st stage screening** – determining if the person understands Home Share, is a suitable candidate, and wants to explore further
* **Stage 2: Application and Assessment Process** – engaging with suitable candidates to explore their interest and capacity to meet both the general and personal suitability requirements to be added to our Pre-approved Home Share Provider List
* **Stage 3: Matching Process** – engaging with Pre-Approved Providers whose profiles are of interest to an Individual to explore a potential match
* **Stage 4: Contracting Process** – working with the selected Home Share Provider to finalize our agreement with them based on the mutual decision between an Individual and a Pre-Approved Provider to begin sharing their lives together.

In this section of our handbook, we will cover Stages 1 and 2 of the selection process.

### Stage 1: Initial Inquiries and 1st stage screening

#### 1. Initial Contact/Inquiry

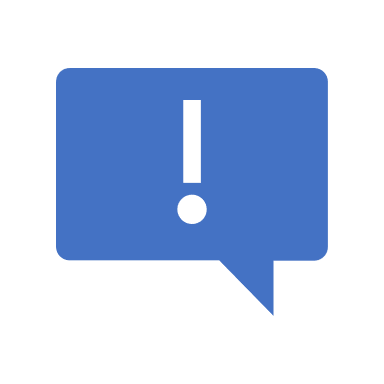
We can expect that not everyone who follows up with us about Home Share fully understands what is involved and/or is prepared to take this role on. They may just be exploring income options or have a suite they are looking to rent and thought this might be an easy route. Finding out their understanding of Home Share, and their motivation for exploring it, is the key focus for this initial contact.



If the initial contact is by phone or in person, we may be able to sort this out quickly. Once we provide a brief description of the service, most people will either opt out because they see it is not a good fit for them or confirm their interest in exploring it further.

If their contact is by e-mail or another written format, a response by phone is likely the best way to initiate a follow up contact so you can have this quick conversation to sort through their interest rather than through multiple e-mail, text, or other exchanges.

Note: If there are any flags or concerns on our end that arise during this initial contact, it is best to simply take their name and number and defer moving on to next steps. Consult with [Name of Leadership Position] and check our initial contact logs. This person may already be known and/or may have made inquiries previously. This consultation and any notes associated with any previous contacts can help guide your follow through with the applicant.

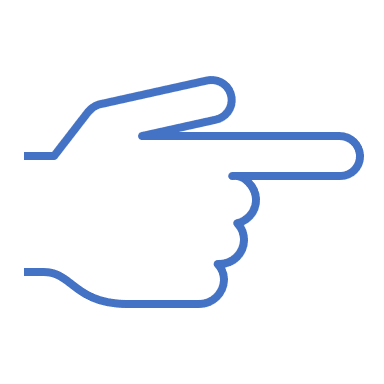
Once the person inquiring has confirmed an interest in exploring this option further, and there are no obvious flags that suggest the person is not a good fit, a pre-screening interview (by phone or in person) can be set up.

It will be important to let the person know that this will be structured interview and they should plan to set aside at least [1 hour] or more to go through the questions together. For the purposes of this handbook, once someone making an inquiry has agreed to a scheduled pre-screening interview, they are referred to as Applicant until such time as they are pre-approved as a Home Share Provider.

#### 2. Pre-screening Interview

Make sure to use and complete all the questions in the most current version of our [Name of Pre-screening Interview Tool you use].

Here are some tips to help guide your discussion with the Applicant:



**Helpful Tips**

* Begin by giving some background around the questions and the ways they support applicants to really think through the role of home share provider so they make a good choice for themselves and so we learn enough about them to determine if they are a good fit.
* Explain that having this conversation does not bind them to any commitment – it is just a chance for them and for our organization to decide whether or not to proceed with any type of formal application.
* Use a conversational style that invites sharing and does not imply there is one correct answer.
* Use examples to help them understand the information you are seeking.
* Give time for them to reflect on their responses.
* Be curious and delve into the responses they provide to make sure you understand.
* Clarify what will happen after this interview – how you will follow up with them.

Note. It can be helpful to conduct these pre-screening interviews and subsequent interviews in teams of 2 where possible in order to gather several opinions/assessments when making a critical decision to approve an applicant.

It is expected that some Applicants may opt out of continuing during or after this prescreening conversation based on learning more about the role and the fit with their circumstances/lifestyle.

For all other Applicants, a decision about their suitability for moving forward must be made. Defer making a decision on the spot. Instead, take some time to reflect on your notes and discuss with other team members or your [designated leader], before following up in writing with the applicant to either begin the application process or to let them know we will not be moving forward with an application.

If you have chosen not to move forward with them, talk with others on your team [and/or use our standardized template] to frame the details in a positive and honouring way. It is especially helpful to consult with others and have them review your letter prior to sending it when there are issues of personal suitability contributing to the decision. Be kind, but forthright, about any personal suitability issues so that you link to our selection criteria rather than your opinion or judgement about them as a person. That way, they can hopefully learn from and have a chance to improve if they want to explore this option at a later date. This can be a delicate dance so make sure to consult about your approach with others on your team.

#### Documenting All Inquiries

It is important that you track all contacts made with people who inquire about becoming a Home Share Provider on our [Name your tracking system]. This practice helps us in multiple ways:

* We can track the impact of our recruitment efforts i.e., the number of responses, the number of responses that moved forward with an application etc.
* We can track our time spent responding to inquiries.
* We can search and find previous records of people or households who have applied more than once so we have more background to respond to the latest inquiry and avoid missing important flags noted previously etc.

### Stage 2: Application and Assessment Process

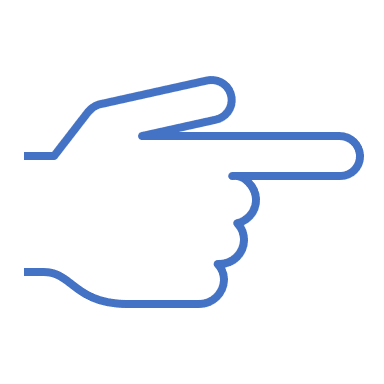
There are many components to our assessment process that determine if an Applicant will be added to our pre-approved provider list.:

Note: This assessment process leads to pre-approval of potential providers but does not guarantee they will be selected for a home share. Once an Applicant is pre-approved, they are added to our available provider list for consideration by individuals seeking a home share.

### A. Application Package

Our application package includes [add your list for your organization]

* Brochure/Info sheet about our Home Share Service
* Request for chronological resume
* Application Form
* Reference Form (names and contacts for 3 references)
* Consent to Exchange Info Form
* Overview of the assessment process and required paperwork that will be expected later in the process
* Make sure you are familiar with and understand the reason for each of the questions on the application form.
* Test drive by filling it in for your home/ family.
* Find out who in your organization can be called upon to help with interpreting for specific languages
* Know local resources who might be able to help with interpretation



Application Form: Our application form guides the applicant through a series of questions that help them to think through and describe their interest and suitability for taking on a Home Share arrangement. This is a detailed form that may take them some time to complete. It is somewhat like a written interview.

While many applicants will likely prefer to complete the form on their own, it is important to check in with them to let them know the types of support you can provide such as reviewing the form together to clarify any questions before they start, being available by phone or e-mail to provide clarification as needed, helping to find them an interpreter if English is not their first language etc.

**Helpful Tips**

It is also important, like all phases of the assessment, to provide the context for the questions asked so that applicants understand the reasons for our interest in knowing about the details of their lives, their skills and qualifications, their work schedule, etc.

Reference Form – This form asks the applicant to provide [3] references including 1 employment reference as well as the names and contact information of former oversight agencies (CLBC, MCFD or Community Agency or Home Share Provider for whom they did respite) if the applicant has previous experience or is currently providing Home Share, Foster Care, or Respite Services.

* Make sure you know what our program will accept if the Applicant’s employers are not accessible i.e., the applicant is long retired or from another country

Consent to Release/Exchange Info Form – This form must be completed for us to be able to contact references and/or do other follow up regarding the individual’s application/resume. It is also needed in order to share their profile with interested individuals.

Overview of Our Assessment Process and Required Paperwork (If this detail is not in your brochure that you included in the application package) – This fact sheet is intended to give applicants a preview of the process we will be following so they can understand and know what to expect. Additionally, it includes a list of the paperwork and certifications they will need to supply as we move through the process. Because there may be costs involved in completing some of this paperwork, we suggest that applicants hold on this paperwork until we have completed steps 1-3 and have agreed we are moving forward.

Our current list of paperwork/certifications that form part of our assessment include:

* Criminal Record Checks on every person over the age of 19 who resides in the home
* Medical Assessment Form from the prospective Home Share Provider’s physician
* A clean driver’s abstract
* A copy of their current and appropriate BC Driver’s license
* MCFD prior contact check (if appropriate and available in your community)

Additional paperwork certifications will be required if we enter into a Home Share Agreement with them (adjust this list to add any additional requirements you have):

* Valid CPR and First Aid (must provide copy of certificate).
* Work Safe BC proof of coverage with personal optional protection.
* Completion of the *CLBC Standards for Home Sharing* on-line course(must provide copy of certificate).
* *CLBC Privacy and Information Management* on-line course (must provide copy of certificate).
* Home Insurance.
* Proof of Canadian Citizenship or Landed Immigrant Status.

### B. Application Package Review and Reference Checks

The application package submitted by each participant must be reviewed in detail. This includes:

* Confirming accurate completion of required release of information forms i.e., authorizes follow up to anyone listed on their resume, application form, reference form etc.
* Conducting and documenting reference checks: The Home Share Coordinator should confirm that references meet the criteria specified on the reference form including at least 1 employment reference.
* Conducting additional checks, (if not provided as references by the Applicant), with any former oversight agency if the Applicant has provided any form of in-home care (Foster, Respite, Home Share) in the past:

*Be sure to check the application form & resume and ask directly (if no mention has been made) to be sure you don’t miss this part of the Applicant’s history. These checks can provide important information to guide your decisions.*

* + If the Applicant is or has been a Home Share/Foster Care Provider in a direct contract with CLBC/MCFD, a reference must be conducted with the relevant authority.
  + If the Applicant is transferring from or has been previously contracted as a Home Share Provider by another agency or agencies, a reference check must be conducted with the former agency/agencies.
  + If the Applicant provided Home Share and worked outside the home, the employer should also be contacted for a reference.
  + If the Applicant has currently or previously provided Respite, a reference check must be conducted with the person or organization with whom they contracted i.e., the Home Share Provider and/or the agency.
* Reviewing the application form in detail and flagging any areas where more information may be needed.

Don’t Forget to Document: Completion of this review and all required details must be entered into [Name of case management system or tracking form you use to track the application process for each applicant] whether you make a decision to continue or not with the applicant.

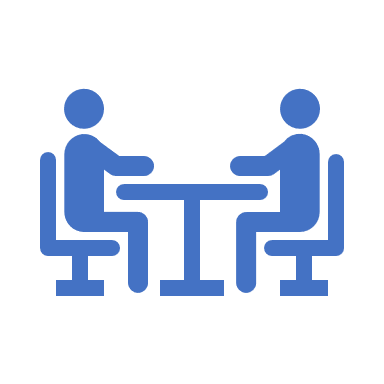
Decide on Next Steps: Once you have completed your review, you have more information to help guide your assessment. Sometimes, you may have some questions or need more clarification about a specific area before you feel confident to move forward. Make sure to follow up with the applicant to get these addressed before making a decision.

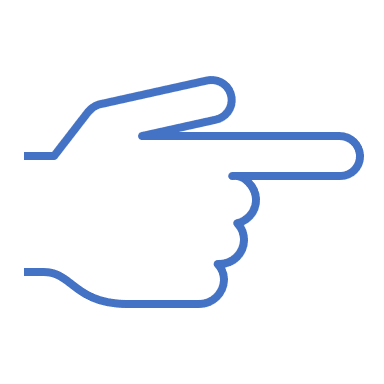
If there are flags – If you have any major concerns or issues that already suggest the Applicant is unsuitable, it is important to flag and alert the [designated leader or others?] that you don’t advise proceeding with the Applicant and the reasons. You can then decide together what follow-up action should be taken and document this on the applicant’s record.

If you are comfortable moving forward – Check in to make sure they are too and then you can proceed with booking a personal interview.

### C. Personal Interview

The personal interview is your opportunity to get to know the individual in more detail and to confirm what they have told us in writing with their responses in person.

This interview should be relatively informal to set the Applicant at ease allowing them to pose questions and raise any concerns they may have about this role and how it will fit for them. While it is important to adapt your style and approach to each applicant, it is equally important to make sure you cover all the questions on our [interview form] with them.



**Helpful Tips**

It can be helpful to conduct interviews as a team of 2 if this is possible. This allows for 1 person to serve as the scribe and also for gaining more than 1 perspective on this new recruit.

Prior to the Interview:

* Arrange a time to meet at a time that works for them. It is ideal if it can be in the Applicant’s home although another setting can be offered if preferred. The timing may mean adapting your schedule to accommodate an evening or weekend meeting. Note: Try to set a time and location where there will be few distractions that may interrupt the flow of the interview. You will have other opportunities during the Home Study to observe household interactions. The focus of this interview is to learn more about the applicant who is the intended, primary provider.
* Once you have settled on a time, block time off in your schedule to transcribe your notes and reflect on your learning. Try to book this as close to the interview as possible (within 24 hours) so that you are better able to capture your observations accurately.
* Be sure to review all the information gathered to date to help your prepare for the interview so you can build on the information already provided and delve more deeply as needed.

#### During the Interview:

* Make sure they know you will be taking notes (recording is an option if they are agreeable but this may impact their openness in sharing information, so should be considered with caution).
* Be sure to use a comfortable pace that allows them time to reflect on their answers.
* Be professional, friendly, and non-judgemental – you are building a relationship and they need to feel safe with you and comfortable asking questions and disclosing any concerns or confusions they may have.
* Be open to and encourage their questions.
* If the meeting is planned in the home, and distractions are unavoidable, you may want to summarize what you have heard from them regularly to help bring them back to the conversation. Alternatively rebooking at an alternate time may be an option if it feels like they are too distracted for you gather the information you need.
* Clarify responses to confirm understanding and double check areas where their response is inconsistent with the information they submitted.
* Be sure to acknowledge them for their time and review next steps.

#### After the Interview

* Ensure you transcribe your notes to the applicant’s record on our [tracking system] within 24 hours of your interview to keep the information fresh and accurate. As in all documentation, it is important to use clear, objective, non-judgemental language. Consult with your partner if you were able to conduct the interview in a team. Otherwise, take time to review with others on your team so you can gain their perspectives on your notes and any impressions about this applicant.
* Unless you have serious concerns about the applicant, at this point, your focus can be on summarizing their strengths, any limitations, concerns or areas needing additional attention and/or more exploration during the Home Study.

Decide on Next Steps:

As with the previous section, if there are major concerns that suggest not going forward, follow the same steps as above. If all looks good and the applicant wants to proceed, move forward with their required documentation unless they have already submitted this paperwork as part of completing their application package.

### D. Initial Required Documentation

Required documentation must be submitted prior to moving on with the Home Study. Make sure to provide the applicant with all the relevant information they need in order to complete and submit this documentation including:

* Our Medical Assessment Form
* Criminal Record Check forms for each adult in the home (over 19)
* Instructions for accessing their Driver’s Abstract
* MCFD Prior Contact Check Release Form (if applicable and available in your community)

Be sure to follow our agency guidelines when reviewing the paperwork the applicant submits, and follow up accordingly if there are any issues identified. All issues must be addressed and resolved in order to proceed with the next step of this assessment.

[Add names of policies/procedures here as links or attach]

### E. The Home Study

#### Timing of the Home Study

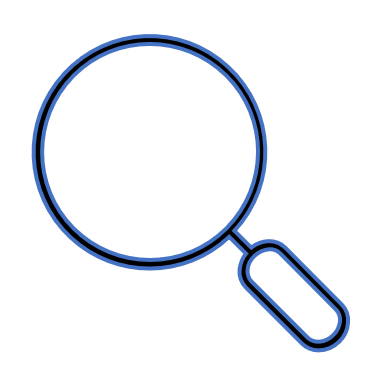
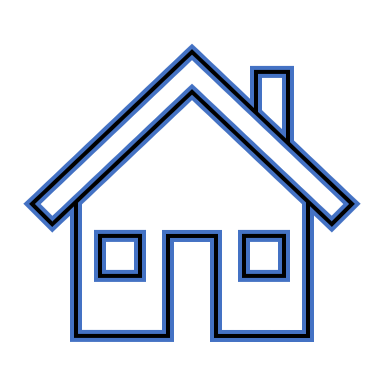
All applicants must participate in a Home Study. This study takes our assessment to a much deeper level. It involves an in-depth exploration of the suitability of a potential caregiver, and their family/household members. It can feel intrusive and is time-consuming for all involved. Note: A home study should only be conducted after an applicant has completed the pre-screening and the first 4 stages or our Home Share Assessment with satisfactory results. Ideally, if possible, conduct the study as a team of two so you gain the benefit of two perspectives.

#### Purpose of the Home Study

Our Home study serves multiple purposes:

1. Its first purpose is to help you as the Home Share Coordinator see and experience the prospective Home Share Provider in their home environment to better understand and appreciate the type of living situation they are offering. It involves collecting information and making observations through interviews and home visits. It also involves using your professional judgment.
2. It is also intended to help the prospective Home Share Provider, and the other members of their household, deepen their understanding of this role. It should help them feel better prepared and have a better sense of how they might, and more importantly if they still want to welcome someone into their home and their life.

Finally, the Home Study provides an in-depth picture of the prospective home share that can be used, if the Home Share Provider is approved, to explore potential matches with individuals who are seeking a home share arrangement. Information gathered is used to develop the [Home Share Profile] that will be shared with individuals as part of the matching process.



#### Components of a Home Study

The majority of the Home Study takes place in the applicants’ home with time to review between visits. Components are:

i/ A minimum of four interviews in the home with the Home Share Provider and must include:

joint interviews with the applicants if there are more than 1,

* individual interviews with the applicants,
* interviews with others who reside or are frequently in the home, including children,
* other adults and/or university/college students who may reside in the home during summers and school breaks.

ii/ Observations/Assessment of the Home

* completion of an initial Health and Safety checklist,
* observations, at different times of the day/week, to see the daily household routines and interactions among household members,
* observations of the overall condition of the home and how it is maintained,
* follow-up to any items identified in the Health and Safety checklist that need to be addressed prior to approval as a Home Share Provider.

### i. Setting the Stage for a Home Study

#### Provide a Clear Explanation of the Process

As a first step, it is important to provide a clear explanation of the home study and how it fits into the applicant approval process. Using the Home Study Fact Sheet for Applicants, make sure to go through this in detail and discuss their questions and any concerns or reservations they might have about the process.

#### Pre-Plan Each Visit with the Applicant

Make sure to pre-plan each visit with the applicant so they know:

WHAT the focus will be

Each Home Study Visit will focus on a different aspect of the overall study. Make sure the applicant knows what the focus will be so they can be prepared and know what to expect. A copy of the interview questions or a summary of what kinds of things will be covered should be provided to them.

WHY this focus

Share the perspective of the supported individual to illustrate the importance of this focus and how it can support a successful home share.

HOW it will be conducted

Let the applicant know what will take place during the visit and how long the visit will be so that you can be respectful of their time. Which of the following can they expect?

* an interview with the applicant only,
* private interviews with different people in the household,
* a group interview with members of the household,
* a walkthrough of the home,
* completion of a health and safety checklist.

WHO needs to be there

Be specific so nothing is left to chance. For instance, if you plan to interview other members of the household, make sure the Applicant knows when and how long they should be at the home to allow you to meet with each of them. If you will be doing a walkthrough of the home and want to have a chance to have incidental contact with household members, while they are engaged in daily activities, let the applicant know this is your intention so everyone in household knows what to expect.

WHEN it should take place

Explore the best times to schedule each visit that will be best suited to the focus and that will work for the household. It is best to think through your focus so you can discuss optimum times of day before seeking times from the applicant. That way they have the information they need to better match it to their schedule, and you don’t need to backtrack. As an example, it is best to schedule the visit to complete the Health and Safety Checklist during daylight hours for best visibility of outdoor spaces and during times when fewer people are in the home to allow for full access to the home without unduly intruding on household members.

WHERE it will be held

Although each visit will be in the home, make sure to discuss any logistical arrangements you might want to have set up i.e. a separate place to meet privately with people, access to the whole house and yard to complete the Health and Safety Checklist. That way, there are no surprises for the applicant and/or others in the household.

### ii. Assessment Areas in the Home Study

| **Assessment Area** | **Key Considerations** |
| --- | --- |
| **A/ Physical Environment** | * Safety features and practices in the home * Suitability of the proposed private space for the individual and of the proposed shared spaces * Accessibility features of the home * Cleanliness of the home * Maintenance/repair of the home * Outdoor space, neighbourhood, and community including proximity to amenities   Note: Prior to the start of a home share arrangement, you must visit the home again and complete our Health and Safety Checklist. |
| **B/ Motivation & Lifestyle** | * Their motivation for and the experience they bring r/interest and motivation of others in the household * Their collective strengths/contributions they can make to provide high quality of life for an individual * Their lifestyle and how it fits with the Home Share Provider Role * Their household rules and ways of managing together * Their approach to managing different situations with an individual including any experience they have in this area |
| **C/ Approach to Household Relationships** | * Family History * Relationships and Household Dynamics * Applicant’s Openness to engagement with an Individual’s Family * Factors that might influence their response to an individuals’ needs * Their capacity to provide a safe and nurturing environment |
| **D/ Accountability Tasks and Training** | * Willingness /capacity to take on the reporting requirements for this role and how they plan to manage these responsibilities * Supports they might need to meet their reporting requirements * Their receptivity to and interest in training |
| **E/ Philosophy and Approach** | * Applicant’s beliefs, values, and subsequent approach to the complexities of involving and responding to the needs, wants, and behaviour of another individual living in their household |

Make sure to follow our [Home Study Interview/Observation Guide] to cover the key areas in each of the 5 components of the study. Document each visit making note of any areas where you want to follow up for further clarification and highlighting the strengths of the applicant and the proposed living situation, areas where training or specific action will need to be taken to meet expectations, and your general sense of the applicant’s suitability for different target populations i.e., *well suited to and interested in individuals with high behavioural needs, would work best with individuals who are fairly independent and active outside of the home during week days* etc.

### F. Compiling the Home Study and Documenting Your Recommendation

As you have proceeded through the Home Study, you will have taken time after each visit to review and enter your summary notes on the applicant record on our [case management system]. Once you have completed your final home study visit:

1. Take time to review the details outlined in your notes and in the applicant record on our [case management system].
2. Make sure you have addressed any flags you have identified so that you have the clarity you need to feel comfortable completing your assessment of their suitability as a Home Share Provider.
   * 1. If you have doubts about any section of the Home Study or other assessment components, book time to consult with your [designated leader] to review and make a plan about whether and how to proceed,
     2. If all flags have been addressed to your satisfaction, move to step 3.
3. You will need to complete an Assessment Summary for the applicant record
   * 1. If you plan to pre-approve the applicant, this summary should include any cautions and/or conditions that will need to be met prior to a match being made. These should have already been discussed with the applicant i.e. *Subject to the installation of fire extinguishers on the lower level as discussed*.
     2. If you are recommending against approving the Applicant, you will need to add your rationale to this summary with specific details about your findings.

NOTE: It is critical that you include clear details in this summary outlining the assessment steps completed and the factors that contributed to your decision. This level of documentation is essential. It not only demonstrates our due diligence in safeguarding the individuals we serve but also provides a factual and professional record of your findings that clarifies the reasoning behind the decision made.

G. Confirming with the Applicant and Developing their Home Share Profile (if appropriate)

#### Option 1: Pre-Approved

If you have made a recommendation to proceed with the Applicant as a Pre-Approved Home Share Provider, you will need to:

* Inform the applicant and confirm their agreement to be considered as a Pre-Approved Home Share Provider. Ensure that you remind them that this means they will now be considered for future Home Share Arrangements that are considered a match for them but that a match with an individual is not guaranteed. It will depend on the preferences and choices of the supported individuals.
* Use your notes and all the information you have gathered to create their [Home Share Profile] that will become part of the applicant’s record. It should be added to our [case management system] and printed in hard copy in an easy to read format. This profile will be used to present the new Pre-Approved Provider to individuals who are interested in exploring their home as a match. Make sure this profile is written in a plain language format that will make it easy for you to have the Applicant review and sign and that will be easy to share with individuals.
* Decide how you will review the profile with the applicant
* If there are any areas where you have identified limitations related to the scope of the Home Share that you have not already addressed and reached agreement (i.e., ‘Not prepared to take anyone with high medical or personal care needs’, ‘Not suitable for an individual with aggressive or other challenging behaviours’), you will want to arrange a time to present the profile in person to discuss these points and explain your rationale.
* If, after your review, you feel the profile is accurate and you have already taken time to discuss any limitations, and the applicant is in agreement, you can choose to deliver in person to go over it together, or, if the Applicant prefers, send it to them in a format that works for them (e-mail, mail etc.)
* Present the Approved Applicant to your team so everyone is aware and can reference their Home Share profile when exploring a match for a supported individual.

*Make sure you have a system in place to maintain regular contact with all Pre-Approved Home Share Providers to keep them on board and ready when the time comes!*

#### Option 2: Not Approved

If you have determined that you will not be recommending this applicant for approval as a Home Share Provider, you will not need to create a profile.

* You must follow up with any Applicant who you are recommending not to approve. It is important that you confirm this decision with them. You should do this by phone, e-mail, or letter, thanking them for their interest and informing them that [name of agency] will not be moving forward with them as a Pre-approved Home Share Provider.
* Be prepared to address any questions they have about why they have not been approved. Be factual referencing your notes and avoiding any judgmental language.
* Make sure they are aware of [Name of agency] complaint procedure if they want to make an appeal.
* Document the date and details of this notification on the applicant record on our [case management system].

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#### Not everyone is suited to the role of Home Share Provider. This is not a about who they are – simply a recognition that this role is not a

## . Finalizing the Home Share Profile:

The Home Share Profile should provide a clear picture of who the Prospective Home Share Provider and their family/household members are as well as specifics about the home and lifestyle they are offering. Some of the overarching questions the profile will answer in more detail include:

* Who are the people that want to share their home? Who will be the primary Home Share Provider?
* Why do they want to share their home?
* How have they prepared their home and their household members to share their home?
* What contributions can they make/are they prepared to make in the lives of a supported individual?
* Are there restrictions on the types of support needs they are prepared to support?
* What does the living space they are offering an individual look like?
* What about the shared space in the home?
* Are there any special features about the home that will be available or restricted to the individual?
* Are there special considerations about the home that might influence who might live there – pets, children, other supported individuals, stairs, accessibility features, smokers etc. ?
* What are the characteristics of the neighbourhood/community where the home share is located?
* What is the overall atmosphere in the home?
* What is the condition of the home?
* What type of lifestyle do they lead and how conducive might it be to supporting an individual?

A copy of the Home Share Profile, once reviewed and approved by the Applicant, is provided to them for their records. This Profile should be reviewed and updated with the Pre-Approved Home Share Provider in advance of sharing with an individual if substantial time has passed since it was developed.

## 4. Chapter 3 – Q& A Recruitment and Assessment of Home Share Contractors

Conducting a thorough assessment of an applicant can feel daunting especially when situations come up that feel uncomfortable. The following ‘what ifs?” are examples of some of the common scenarios that can arise that require us to think carefully about our response:

What if the applicant is a family member of an Individual?

**The same steps apply**: As a service provider, we are obligated to follow the same due diligence process we do with all potential Home Share Providers to ensure the health, safety, well being and quality of life for the individual can be met. Some family members may balk at the need to participate in the assessment process. It will be important to collaborate with your [designated leader] along with everyone on your team to ensure you are all aligned with this practice so there is a consistent response to their queries about the need for the process. It can be helpful to create a fact sheet or other simple resource that outlines the rationale for our approach that focuses on the best interests of the Individual served and the family member who is exploring the Home Share Provider role.

**Confirm agreement with the funder**: In most cases, the funder will have pre-approved and made this referral to us. If that is not the case, it is critical that the funder is consulted prior to exploring this option.

**Link to other family members/providers**: If you have been through the process with other family members who you feel could help promote the value of our role and the assessment process, ask them if they would be willing to talk about the experience with the applicant. Sometimes, hearing from other family members can make all the difference.

**Confirm their commitment to our practice standards**: Be sure, as you build your relationship with them during the interview and home study that you confirm their agreement to follow the documentation, reporting, training and other requirements we have of all Home Share Providers. It is important to help them understand that, by contracting with us, they are accountable for the same level of responsibilities as any of our contractors to health, safety, well being and quality of life for the individual.

**Consult with Your [Your Designated Leader]:** Foster Care Providers often bring wonderful experience to the role of Home Share Provider. However, it will likely depend on their current circumstances and how they see integrating a new home share provider role into their existing home and responsibilities:

* If they are actively accepting placements, their capacity to provide a consistent and stable Home Share environment for an individual is questionable due to the unpredictability of foster placements
* If they are seeking to transition from foster care to Home Share to continue on with a young person for whom they have been the foster care provider, they may be an ideal candidate as long as they are comfortable with the shift in role, change in rates, and change in oversight.

What if a Home Share Provider provides Foster Care?

**Proceed carefully even if you feel confident about them**: If the individual they have living with them is part of our Home Share Program, we will be starting from a different place with a relationship and a history already developed that can help guide our decision making. However, even if we are delighted and can’t wait to have someone new move in because we feel confident about the provider, it is critical that we follow all our steps to ensure we don’t inadvertently overestimate their capacity or upset the stable arrangement already in place. It will be important to explain that our previous assessment involved a different household. We need to now do the same level of assessment on the current household, find out what the current individual feels about having another person in the home, and explore the interest and motivation of all members of the household now in order to make a good decisions for everyone and not regret it.

**Pay attention to any concerns you have with their current contract**: It can be easy, if you are needing providers urgently, to ignore past issues or minimize them. Be sure to think through any challenges you have had with this provider in the past and/ or concerns you have had to address with them. Adding another individual when the provider is already challenged to meet certain expectations of their responsibilities to the individual and/or to you may exacerbate these concerns.

**Use your team/[Designated Leader] as a sounding board**: Present your case to others if you believe this provider is a good fit to welcome another individual into their household. Have them help you think through the pros and cons and determine the types of matches that would be a good fit.

NOTE: Your focus is on assessing their capacity to be considered for another match. There will be further considerations when exploring a specific match with an individual once they have been pre-approved for to include another individual. These are covered in the next sections of this handbook.

What if a Home Share Provider already has an individual living with them in a home share we support?

**Find out the reason for this decision**: It is critical to explore the provider’s/funders motivation in seeking to contract with us. If there is any indication that the relationship with the current organization is contentious or problematic in any way, it will be important to involve your [Designated Leader] before proceeding. Together you can determine if and how you want to proceed. If the provider has moved from another community or your funder currently holds the contract and has asked us to take over the contract, find out a little more about the reason for choosing our organization and how the Home Share Provider sees working with us before deciding to move forward with the assessment stages. Discuss and work through any flags with your **[**Designated Leader] before proceeding.

**Let them know you will be consulting with the previous organization or funder**: Make sure they sign a [Consent to Release Form] so you can follow up with their current/previous contract holder and that you have a candid conversation with them using our [Reference Questions] to learn more about this relationship, their history, and their satisfaction with this Provider’s performance in all areas.

**Be clear that we will be conducting our own assessment like we do for all new providers**: They may balk at this requirement. Like we discussed above in the QA about families as providers, be sure the whole team is aligned with this practice and reinforces it if the Provider chooses to raise concerns with others at [Name of agency]. Taking time to review the importance of this assessment to build our relationship and full understanding about this Home Share so we can support them effectively.

**Get to know the individual and their family/personal network separately through our intake process**: It is important to establish a strong and trusting relationship with the individual and their family/personal network (as appropriate). As well as helping them to connect with our organization and the role we will play in supporting them to maximize their quality of life, establishing these relationships can ensure that all of us involved with the Individual can be part of the safety net for the individual in our respective roles.

What if a Home Share Provider or the Funder wants to transfer their contract to our organization with an individual who they already have living with them?

What if the applicant is a direct relative or shares the same household with an individual employed at [name of agency]?

**Make sure this is declared on the application**: If this section of the application form has not been completed, make sure you ask this question to verify any relationship with [name of org] employees. While in most cases, this relationship will not affect the applicant’s eligibility to take on this role, it must be declared and a [conflict of interest form] completed that acknowledges this dual relationship and the expected standards that must be followed to protect role boundaries.

**Ensure this relationship is fully explored as part of your assessment**: It is important to help the applicant think through any role the named employee might play in this Home Share arrangement and how they will manage this dual relationship with [name of agency]. Make sure they know about and confirm their agreement to the safeguards in place.

**Be aware of and guard against any biases in your assessment of the applicant**: It can be easy to assume that, if the applicant is a direct relative or member of the same household as an employee, they have the same qualities, values and ethics as them. This can colour your assessment of the applicant either creating a more favorable, or perhaps the opposite, impression depending on your relationship with the named employee. Make sure to discuss this with others on your team and, in cases where you are aware of a specific bias and/or have a close relationship with the named employee, ask that another member of the team take over the assessment.

**Ensure clear documentation is in place**: Make sure that any contract with the applicant to provide Home Share Services is in the applicant’s name and attach the conflict of interest form outlining the expected standards to ensure it forms part of the agreement with the Provider. Make sure this relationship is reviewed as part of your monitoring of the Home Share arrangement .

**Consult with your Team and Leadership**: It can be easy to succumb to the pressure of finding a match for an individual and start shortchanging our assessment or ignoring flags we would usually delve into more deeply. If you find yourself experiencing this pressure, consult with [Name of designated leader] to explore these feelings and the impact on the quality of your assessment. Work with them to problem solve so that you don’t shortchange the process. Making a poor choice can be detrimental to the heath, safety, well-being or quality of life of the individual and be more work in the long run.

w



What if we are struggling to recruit new providers and you feel pressured to ignore some flags or to rush through an assessment in favour of finding a placement for an individual?

Or to rush through an a

**Chapter 4**



**Finding and Establishing a New Home Share Arrangement for an Individual**

# Chapter 4A: Setting the Stage for Successful Matches

## 1. Setting Realistic Timelines

Compatibility is the key to successful home share arrangements. Assessing for compatibility, often called the ‘Matching Process’ requires our careful attention and, more importantly, our patience. So often, in the real world of recruiting potential providers in an already ‘tapped’ market and responding to each individual’s desire for a home ‘right now’, we can feel pressured to move too quickly through this matching process and/or to leap with the first potential Home Share provider that comes forward as our single option.



This is not what I wanted!

It is important to monitor this tendency.

If we have done our work well in the assessment phase, you should feel confident that both the individual and any prospective pre-approved Home Share Providers are good candidates for the home share model. The key is whether they are actually a good fit together. Rushing a decision may mean you find yourself dealing with unintended consequences of a poor match. While many of these may be weathered, they can take considerable time to address and may set the stage for a full breakdown in the relationship. In these cases, the impact can be significant and long lasting for both parties. It is our job to lay the groundwork so these situations can be avoided as much as possible.

Experience has also shown that poorly made home share arrangements can have a significant impact on program operations that could impact more than the individuals immediately involved. Some examples:

* High levels of support needed to sustain the arrangement can take attention away from our support of other Home Shares.
* Health and safety issues arising from incompatibility and/or Home Share Provider capacity to effectively support the individual can prompt external investigations.
* Loss of good Home Share Providers from our cohort can result because they choose not to continue with this, or any other potential match based on a bad fit that made them feel vulnerable or frustrated.
* Disgruntled parties broadcasting their experience to others in the community affect our reputation and capacity to recruit new providers who don’t want ‘that grief’.

Make sure you take the time to explore each potential match. If you are feeling pressured, speak with your [designated leader] to get support and guidance so you can avoid shortchanging the process.

## 2. Understanding the Matching Process

Matching involves a number of stages, each dependent on the other as shown in the chart below:

At any stage, along this continuum, if either party is uncomfortable proceeding, you will need to go back to stage 1 with new provider options.

## 3. Moving through the Matching Process

### Stage 1 – Selecting Potential Options

This stage involves 3 steps:

Step 1: Find Suitable Providers:

Using the profile developed with the individual, take time to cross-reference the Home Share Profiles of any available and pre-approved providers to assess potential fit as a ‘Home Share Candidate’. Ideally, you will have some pre-approved providers you can draw on to explore. If not and/or in the case where there is only 1 pre-approved provider from which to choose, it will be important to initiate recruitment specific to the individual in order to support our commitment to providing choice for the individual. Best practice is to have at least 3 candidates if possible.

No

No

YES

Start with individual profile

Are there existing pre-approved providers that might be a match?

Enough to offer a choice?

Recruit new providers specific to individual & complete assessment for each

Test interest in available options with individual

Test interest in individual with selected candidates

2

3

1

Confirm plan to explore selected available options with the individual

Step 1 – Find Suitable Providers

Step 2 – Test Interest in Exploring Each Match

Step 3 – Confirm Plan

NOTE: If the Individual has referred a particular Home Share Provider and you have completed the steps to approve as a Home Share Candidate, you likely want to just start with them by moving to stage 2. However, it is critical that you complete Stage 2 to take time exploring the match and how it will actually work to live together even if they know each other well.

Navigating the Engagement of Family/Personal Network Members

Although our focus is in finding the best fit for the individual, for many individuals we support in our services, the family/personal network can and may assume considerable influence over any decision made. In some cases, they hold a legal guardian status. In other situations, their active involvement in their family member’s decisions may be an integral part of their relationship with them that they have assumed historically and want to continue. Your initial intake and assessment should have identified the important role the family/personal network plays in an individual’s decisions. You will need to factor this into your planning so that you assure they are included in ways that work for the individual, and that their voice is factored into your facilitation of each of the steps of the matching process. Regardless of how you might feel about the role the family has assumed, it is critical that you not alienate them. Only in extreme circumstances where there is a history of abuse and neglect that warrants a different approach, it is expected that you will follow through on [name of agency]’s commitment to respecting and nurturing the individual’s important relationships with their family and other members of their personal network. However, except in cases where the family is the legal guardian, it will be equally essential to take the lead from the Individual about how to include these network members in the matching process.

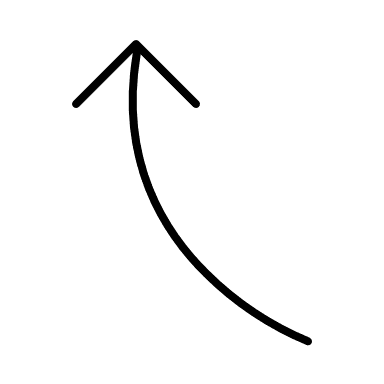
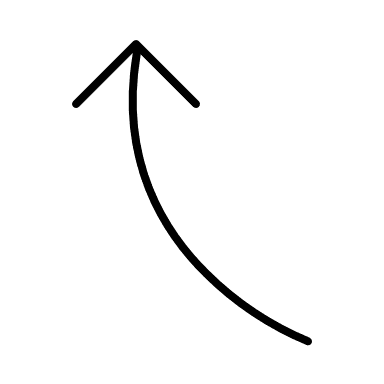
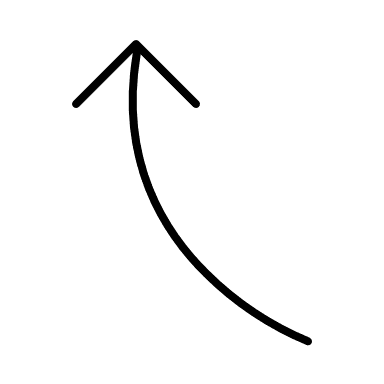
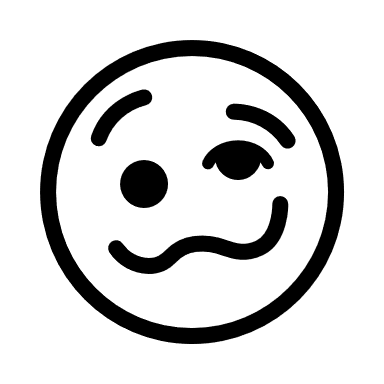
Strategies for Including the Individual’s Family/ Personal Support Network:

[Name of agency] recognizes the important role that Family/Personal Support Networks play not only because they can bring their history, experience, and personal commitment to support the Individual but, because they form an essential part of the safety net of safeguards for an Individual in a shared living arrangement.

* When an Individual indicates a preference to participate independently in their own exploration of home share providers, [Home Share Coordinators/Managers] should take time to explore how to honour this choice without alienating close members of the Network. Helping the Individual to see the value of their Personal Support Network’s involvement and, ways to include them without impacting on their autonomy, can both validate the Individual’s choice and at the same time help them to navigate new ways of keeping their family connected. This approach can help set the stage for the ongoing engagement of the Personal Support Network. Some options that might be suggested:
  + Providing the family/personal network members with their own copy of each [Home Share Provider Profile] to review and discuss with their loved one.
  + Hosting a separate meeting with the family/personal network to address any questions/ concerns they may have after reviewing each profile.
  + Arranging a mix of joint and independent visits with each home share provider.
  + Providing ‘homework’ for the Individual to review each of the providers and what they like or don’t like about them with their family/personal network and talk with them about what they think, etc.
* In cases where the Individual chooses to involve a family member or other member of their personal network, your role will be to ensure the Individual is at the centre of the process, and that the matching process is tailored to their personal learning style and needs so they have the space, encouragement, and consistent opportunity to be actively engaged.

#### Step 2: Test Interest in Exploring the Match

We next need to confirm interest and an agreement from all parties to move forward with initial introductions and exploration. To do this, you should contact each of the parties to provide some basic, non-identifying information about the potential home share and why you think it might be a good fit. Make sure to address the specific details the individual outlined in their profile and those the Home Share candidate provided in their Home Share profile.



For the Individual, this information might include:

* the neighbourhood or general location of the home
* type of living arrangement
* the number and age range of people living in the house
* any of the specific features that might make this option a possible fit (e.g., shared hobby or interest, the way people in the household relate to one another, their experience, a special feature of the house such as backyard pool) or other details, remembering to ensure they are non-identifying

For all selected Home Share Candidates, this information might include:

* age, gender
* an overview of the times each day that the individual will require support
* their ability to be in the home or community without supports
* types of specific support needs - i.e. personal care, transportation, etc.
* current activities the individual enjoys
* current living situation
* funding level/support allocation
* some of the ways in which the Individual seems like they would be a good fit based on the motivations, interests and capacity/experience outlined in the Home Share Profile

If only 1 Home Share Candidate is identified from the available pre-approved Home Share Providers, it will be essential to avoid any undue pressure on the Individual to agree to the option presented. In these cases, Home Share Coordinators should preface their introduction of a single candidate as “one possibility that is available right now” rather than as the only option they will have to consider. Let them know, you have or will be starting to recruit other options.

3. Confirm Plan with the Individual

Once you have confirmed interest with both parties and have 1 or more options ready to explore, check in with the individual to confirm how they would like to proceed:

* Explore one at a time
* Explore concurrently

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*Make sure to help the individual choose a pace that works for them*

This way

This way

* Start with the one available and then move on to any others as they become available

It is essential that the individual be reminded that exploration is not a commitment. They have the option, at any time, to choose not to move forward with any of the choices provided if they are not feeling comfortable.

### Stage 2 – Facilitating Exploration of Each Option

It is important for Home Share Coordinators to encourage both parties to give themselves time to explore the fit before making a final decision. They should also review the various stages involved in learning about each other so that neither party feels pressured to make a decision quickly. The focus should be on identifying how and if this living arrangement will work for both parties. Both should feel comfortable asking questions, raising any concerns, and seeking input from Home Share Coordinators at any time during the process to assist them in making a good decision for themselves.

Like Stage 1, there are a number of steps in this stage of exploration.

Step 1 : Agree to Terms - Reconfirm agreement to exchange info and confidentiality

obligations with both parties.

Step 2: Arrange initial meeting.

Step 3

Spend time with each party separately after they have met to review and discuss the information about one another and take time to answer any questions

Move on to other providers

1 or both say no

Both agree to continue

1 or both say no

Step 4

Arrange multiple opportunities to connect

* Meet with others in the household
* Spend time learning about each other
* Engage in household activities

1 or both say no

Step 5

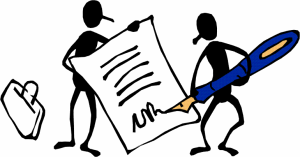
Decide whether to consider for final selection

#### Step 1: Agree to the terms of exploration:

It is essential that both the Individual and the Home Share Candidate understand and commit to the terms of exploration. Even if you have talked about these previously, make sure you review these details again before proceeding with exploration:

Each Individual must:

* Have a signed consent on file for the release of their Personal Profile, Vulnerability Assessment, and other related information to the identified Home Share Candidates for the purpose of determining suitability and compatibility.



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* Have been provided with an opportunity to review their Personal Profile and Vulnerability Assessment prior to having it shared with others.
* Confirm their understanding of their obligation to protect the confidentiality of any information shared with them about all potential Home Share Providers they will be considering and have a signed confidentiality agreement on file committing to these terms that extends to all identified Home Share Candidates.

Each Home Share Candidate must:

* Have a signed consent on file for the release of their Home Share Profile, and other related information, to Individuals identified as a potential match for the purpose of determining suitability and compatibility.
* Have reviewed and approved their Home Share Profile.
* Confirm their understanding of their obligation to protect the confidentiality of any information shared with them about an Individual seeking a Home Share arrangement and have a signed confidentiality agreement on file committing to these terms.

Remind both parties that they are under no obligation to follow through with a placement if they decide it is not right for them.



#### Step 2 – Arrange Initial Meeting

Who to Include: Typically, for the first meeting, it is best to arrange for the primary Home Share Candidate and the Individual to meet. If the Individual prefers and/or if the Individual has a guardian, members of their support network should be included in this meeting.

Purpose: The goal and intention of this first get together is to establish a connection between the Individual and the potential provider without the distraction of others in the household.

Who Facilitates: Home Share Coordinators should take the lead in facilitating this meeting and/or support the Individual to take on the role if they would prefer.

Agenda topics should typically include:

* + Basic information about one another.
  + What each learned about the other from the Home Share Coordinator that prompted an interest in exploring this opportunity.
  + What each person believes are the most important features of a good home life and why these matters.
  + General discussion about expectations, support preferences, etc.
  + A tour of the home including the proposed living space for the Individual and the shared spaces in the house.

Follow-up:

You should follow up with both parties after the meeting to debrief their experience:

|  |  |
| --- | --- |
| If Both Parties are still interested | If either party opts out |
| * Explain next steps and move to step 3 | * Acknowledge their decision, address any questions, concerns and then go on to explore/recruit other candidates |
| Be sure to share the decision to continue or not continue with each party and provide a brief overview of why this decision was made, if appropriate | |

There may be times that involving the individual in exploring options may require specific strategies to support their engagement. For instance, you may find that, with individuals who don’t use words to communicate, you will need to spend some time with each potential provider helping to ‘translate’ alternative forms of communication the provider may find harder to interpret. It will be important also, to take time with the individual and/or any family/personal network to explore ways the individual can best check out each potential Home Share in ways that work for them. It might mean spending longer periods of time in the environment at various times during the day to gauge their comfort in the household, spending time with the provider doing a preferred activity so they can express their comfort with the ways the provider interacts with them, or including family members in this exploration so they can help to assess each environment.

With individuals who experience anxiety, paranoia or other conditions that may be expressed in resistance or fear towards exploring new people/environments, you will need to take their lead and perhaps also get their permission to involve a trusted mental health professional or family member to help them be part of this process. Hopefully, through your initial intake assessment and the development of their personal profile, you will have already started to become familiar with best approaches for helping these individuals engage in ways that work for them and can pass these along to interested providers. Because they will have had a chance to look at the profile before deciding to meet with an individual, provider candidates should already be aware of, and be prepared for some of the behaviours the individual may exhibit (such as extreme shyness, no eye contact, compulsive gestures etc.).

#### Step 3 – Review Information Gathered with each Party

Once both parties have had a chance to meet, you will need to take time with each of them separately to view the specific information you have gathered about them and answer their questions. This is a time for frank discussions about the realities of sharing their lives together and what it might mean both in terms of benefits for both but also in relation to the adjustments/accommodations they may need to make to enjoy a successful living arrangement.

Home Share Candidate:

If this candidate is new and has not been involved in any shared living arrangement previously, they may need more prompting to make sure they ask enough questions and think this information through for themselves.

* Review the Individual’s ***Personal Profile*** and ***Vulnerability and Safeguards Assessment*** in detail with them taking time to point out some of the reasons you saw them as a good fit for the individual. Make sure to point out the individual’s interests and some of the ways they might enjoy making a life together.
* Make sure to give the time needed to respond to any questions arising. They may want to talk with others in their household and come back with additional questions.
* Pose questions specific to the individual and the candidate’s comfort with responding to the individual’s support needs or some of the expectations they have identified as important to them.
* Ensure you have information about the supports available to the individual that can complement the role of the Home Share Provider so you can discuss how they might fit.
* Talk more about your role and the monitoring/support you can provide, including training if needed.

The Individual:

* Review the ***Home Share Profile*** that was created with the Home Share Candidate so the individual has a more comprehensive understanding about the Home Share arrangement being offered.
* Encourage them to ask questions based on the profile they created so they can start to better understand what they can and can’t expect as part of this living arrangement.
* Help them to see the ways you see this home share as a good match for them and take time to explore in detail any discrepancies they see in what they want and what is being offered. They will have already had a chance to see the home and may have a better sense of how it might work for them or what they are worried might not work. Talk these things through so you have a better understanding both for this current option and for any future ones about the types of non-negotiables that might be emerging for them and what they feel they can let go of if other things are in place i.e., *ok if it is not in the right neighbourhood if the bus system works and everything else feels good.*

#### Step 4 – Arrange Multiple Opportunities to Connect

If both parties are feeing quite confident and comfortable with the relationship that is emerging, arranging multiple opportunities to connect can help to solidify things for them. It also ensures that the individual has a full sense of the household they will be joining so be sure this step includes:

* Time at the home when all household members are present
* Time to connect with individuals in the household separately and together ( as appropriate) to learn about each other, ask questions etc.
* Time not just ‘visiting’ but engaging in a household activity together such as preparing, eating and cleaning up together after a meal

#### Step 5- Decide Whether to Consider for Final Selection

Because each individual will ideally be exploring more than 1 option, our focus in this last step is not to choose whether or not to go with this provider, but rather to either add the provider or eliminate the provider as a consideration for a final choice.

Knowing that this is still not a commitment can help individuals and providers feel less pressured. Your task is:

* to help individuals either rule this option out or continue to consider them
* to confirm with the candidate that, if the individual wants to continue to explore this option, they are still on board and would be open to proceeding.

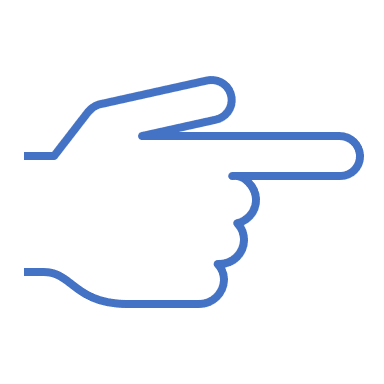
### Stage 3 – Making a Final Selection

Review of All Options:

Once the Individual has been supported through the above exploration steps with any identified Home Share Candidates and has either created a shortlist (if more than 1) or identified a clear interest in a single option, time should be set aside with the Individual to weigh the pros and cons of the option(s)using their Personal Profile for Home Share as a guide.

In cases, where there is a single candidate and/or the individual has only chosen to screen their pre-selected candidate, it is important to walk through these steps with the single candidate and not just assume a fit. This is a critical practice that must be followed to underscore for the individual, their right to make a good choice for themselves even if it means a delay in finding a Home Share arrangement.

Before starting this process, you should first check to confirm the continued interest of each Candidate.



**Helpful Tips**

Remember to be neutral when discussing options. It is important that the individual feels free to make their own choice. Keep the profile front and centre so you are referencing the things they have said matter to them when discussing the choices rather than your opinions.

Encourage the individual to consult with their Personal Network and/or to take time to think through their choice in the ways that work for them. These options can help set the tone for the individual to feel empowered to make their own choice.

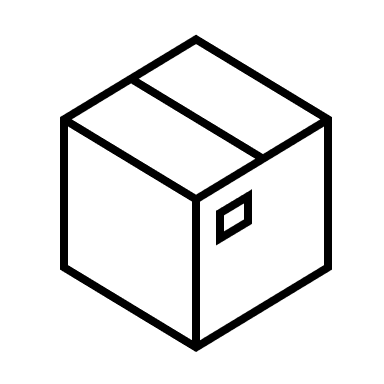
If they are considering only 1 shortlisted option, remind them they can still opt out and we can look at recruiting new options. This is especially important if you are getting the sense that the individual is just ‘settling’ for what’s available. For many individuals, choice making may be a very new experience. It is important that we not rush their decision making. Instead, we should use the opportunity to coach them in how to make an informed decision by walking through the pros and cons of this option and talking about how this learning can help with recruitment of other options if this one does not work out.

For individuals who do not use words to communicate, you may need to rely on your observations, and the observations of others in their personal network, of the ways they have expressed their interest in, comfort with, and other reactions to each provider and the environments they are offering. In these cases, it will be essential that you document the feedback from the individual that is used to help in prioritizing the options.

If the individual is feeling an urgency to make a choice because of their current circumstances, talk with [designated leader] about other alternatives that could be offered on a temporary basis to help ‘buy’ the needed time to make the right choice with the individual.

Stick to the vision and trust the process

### Stage 4 – Finalizing the Selection with all Parties and Mapping out a Plan

While confirming the decision with everyone may naturally happen as part of Stage 3, it is important to be sure that both parties have made a firm commitment to sharing their lives together. One way to do this can be to meet together and map out plans for the move in. Setting a target date and identifying the steps each will take to prepare for the move helps to make this planning more concrete. We will talk about these specific steps more in the next section.

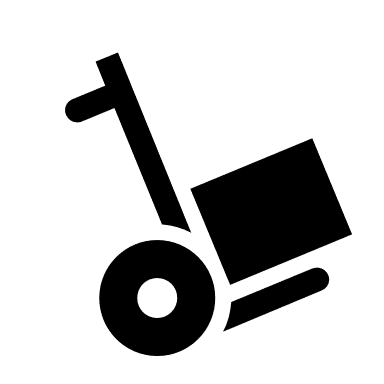
New Home Share Provider to meet with HS Coordinator to review and sign contract and complete onboarding



Provider and individual to map out a transition plan and timeline for the move

Individual to work with HS Coordinator and Network to plan move from current home

HS Coordinator to conduct Health & Safety Inspection of home and book follow-up of any items to be addressed right before the move



Provider and Individual to plan and facilitate any modifications to the space



While no two plans will look the same, the visual above shows the key areas to address. Each of these key areas is addressed in the next sections of this manual.

## 4. Chapter 4A – Q& A Setting the Stage for Successful Matches

Matching is more of an art than a science. There is no one way. Our efforts must be guided by what we know about the individual. The process itself can be an important learning ground for ensuring we ‘get it right’:

What if there are no potential providers that match the Individual’s profile?

**Expect this to be the case**: Given the challenges already identified with recruiting and maintaining a list of active pre-approved providers, we need to expect that our capacity to find compatible providers that are ‘ready to go’ when we need them will be limited. Be sure that you have been clear and open with the individual from the start that this process may take time. Don’t make promises you can’t keep!

**Make recruitment of new providers a priority**: Tailoring your recruitment efforts to match the specifics of an individual is important. Follow through with all the approaches identified in our recruitment section and be sure to consult with your colleagues across the organizations to help put the word out.

**Consult with other Home Share Programs**: Keep the focus on the individual. If you are not sure you will be able to find a match for them based on your assessment of their needs, explore with your colleagues in other organizations so that you can maximize options for the individual.

What if the individual consistently refuses all options even those you believe could be a good fit?

**Behaviour is a Form of Communication**: Although we may feel like we have gained an in-depth understanding of the individual’s preferences during our time getting to know them as part of intake, it is important to remember that this understanding will deepen as we start to explore their vision of their life more concretely while they explore various living options. What we may see as ‘fussy’ may be their way of letting us know what really matters to them. We need to stay attuned to this form of communication.

* In some cases, we may find they really don’t want to live with others. In these cases, we may want to explore other types of shared living arrangements that offer a separate suite, or other more independent option, or point them to a program that offers more of what they want such as semi-independent living.
* In other cases, their reluctance may be related to fears or anxieties they may have related to decision making and/or the prospect of joining another household. This may manifest in a number of ways that can be misinterpreted as indifference, resistance, or seemingly manipulative behaviour.

If you find yourself triggered by the individual and/or frustrated with them, seek guidance from designated leader to help you work out how best to support the individual. When possible, involve another Coordinator to work alongside of to get a second opinion. This challenge raises an interesting issue re: the right fit between a Coordinator and the individual as well. It might be good to consider a change if this isn’t working.

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**Honour their choice**: Each individual has the right to make their own choice about where they want to live and we want to make sure they feel empowered to do what is right for them. Our job is to help them identify and address any underlying pressures they may be experiencing that could be motivating this choice so we can help them work through these if they want. We also need them to understand that the provider also needs to make a choice.

These discussions take finesse so that we don’t inadvertently undermine the individual’s choice and voice. Offering feedback such as “*Wow this is great…I can see you really want to make this one work and feel like it is a good fit*. *Let’s take the time to keep exploring this one if it feels right to you.*

*We can always decide later to check some of the others out if after a few more visits here, you aren’t as sure*. This leaves the window open without undermining the individual’s choice. If they balk at this, saying they just want to move in and don’t even want to take time to explore the one they’ve chosen further, you have a window to explore what’s prompting this haste and can look at problem solving from there. It will be important to remind them that the provider also has to feel confident it will work and may want to continue with more visits before making a choice. It may be important here to remind the individual of their obligation to provide notice if things don't work out which may mean that they do not receive their contribution amount back if they choose to leave early. This needs to be presented in a non-judgemental way to ensure that the person does not feel pressure but rather understandings both their rights and their responsibilities when making this kind of decision.

What if the Individual wants to go with the first place they look at and doesn’t want to explore the other options available?

**Unpack the issue**: Like all our interactions with family members, and others supporting the individual, it is critical that we stay neutral and do not take action that will alienate these important members of the individual’s life. Unless there are known concerns that caution against engagement with them, it will be important to listen and learn about their concerns without discrediting the individual’s choice or appearing to side with one or the other. Our focus here should be on gaining a deeper understanding about the flags they have with the selected home share arrangement so that we can make sure these are explored fully and that they help to guide our support for the individual in making the right choice for them.

**Recognize the transition they may be making**: If the individual is living at home, and this home share will be the first time they will no longer be in their family’s care, family members may be experiencing some separation anxiety or other emotional responses to the individual’s choice to leave home. If the family sought Home Share because they could no longer manage the individual in their home, they may be experiencing feelings of failure or disappointment and be envious of the HS Provider if they appear successful. No matter the situation, complex feelings may influence their engagement with the home share provider. As much as possible, you want to be able to normalize these reactions without minimizing any concerns they name. It will be important to ensure they find positive ways to be included in the new household and that any fears or trepidations they have with the current provider are aired. Unless conflictual relationships have already been formed, try to engage the provider in spending time with the family to start building a relationship. It might also be helpful to link them to other family members who have made similar transitions if they are open.

**Recognize and honour their experience**: It is likely that the family and others supporting the individual have played an important role in advocating with and on behalf of the individual throughout their lives and have had experiences that has prompted their concerns about the provider in question. Acknowledge the important role they have played and explore ways they can offer their input while also supporting the individual’s right to make their own choice. This can be a delicate balance. Seek support from your designated leader and other team members to help you navigate this role.

What if the family/personal network is not happy with the selection the individual makes?

# Puzzle with solid fillChapter 4B: Contracting with and Onboarding Home Share Providers

**B. Contracting with and Onboarding the Home Share Provider**

## 1. Understanding the Contractual Arrangement

As part of the initial recruitment and assessment process, you will have discussed the role of the Home Share Provider as an independent contractor and the general responsibilities involved. Now that the provider is ready to move forward with a commitment, it is essential that the contractual arrangement be spelled out clearly with them so there are no surprizes. Details that you might have covered already will now have more meaning and need to be understood.

Legal and Other Advice

Always be sure to let the provider know they should seek legal advice prior to signing the agreement with you if they have any questions. Explain that you cannot answer any legal questions regarding the contract. You can go over contractual expectations with them, and what these mean, but cannot provide a legal interpretation. Also advise them to seek guidance from an accountant or CRA directly regarding income and taxation questions.

The [contract] and [Home Share Contractor’s Guide/ Handbook] should be reviewed in person with the provider. Book enough time so that you can cover these in detail and give plenty of time for questions. Ideally, it is best to provide copies of these documents in advance, so the Provider has time to review them independently, consult with others, and/or get legal advice prior to meeting with you. You can provide a hard copy or send a blank copy of the contract template and Guide electronically.

If you are unsure of any of the contract language and/or the details in the contractor’s guide, make sure you consult with [designated leader] prior to meeting with the provider.

Preparation Required:

* Confirm that all required paperwork has been completed and meets standards.
* ICBC Driver’s Abstracts (for all household drivers that will be driving the individual) and proof of automobile insurance
* Criminal Record Search
* House insurance coverage
* Criminal Record Checks for anyone living in the home 19 years and older
* MCFD Prior Contact Check (if appropriate and available in your region)
* Physician’s Clearance letter
* Valid CPR and First Aid Certificates
* Work Safe BC proof of coverage with personal optional protection
* Completion of the *CLBC Standards for Home Sharing* and *CLBC Privacy On-Line Training Courses* (must provide copy of certificates) and any other training if required prior to signing the contract
* Update the contract template to include the specific details about the new home share arrangement including the funding amount, address of home, legal name of provider etc. Confirm any additional details that need to be added to the template with our Accounting/Contract Management Team.
* Make sure you have a copy of the most recent Home Share Contractor’s Guide/Handbook.
* Make sure you are familiar with the details of the contract and the Home Share Contractor’s Guide/Handbook and all other schedules identified in the contract.

Meeting Agenda:

Note: If there are any cultural or language barriers that might make understanding this agreement challenging for the Provider, make sure you factor this into your planning. They may prefer to have other family members or friends to help them or an interpreter present.

* Confirm the accuracy of the Home Share Provider information inserted in the contract with the Home Share Provider.
* Review and ensure understanding about the role of independent contractor as identified in the contract and, in more detail, in the Home Share Contractor’s Guide/Handbook.
* Clarify that both documents form part of the contractual agreement – the contract spells out the terms, conditions and payment details while the Home Share Contractor’s Guide/Handbook covers the specific standards and requirements that the contractor must follow to be in compliance with the terms and conditions set out in the contract.
* Review the Agreement and the section in the Home Share Contractor’s Guide/Handbook regarding the term and conditions of the contract.
* Emphasize the value of getting independent legal advice and income tax advice with regards to the nature and contents of this contractual agreement prior to signing.
* Be available to answer any questions and/or to review both documents in detail with the Home Share Provider, according to their preference.
* Confirm a timeline with the Home Share Provider for signing the contract that allows them to have the time they need to thoroughly review the two documents before signing.

## 2. Building a Good Working Relationship

### A. Onboarding and Establishing Expectations

As a Home Share Coordinator/Manager, you may have already built a relationship with the provider as part of initial assessment and approval. However, if you were not part of the recruitment of this provider, you may have had minimal contact outside of the matching process and your work together confirming the contractual agreement. In either scenario, it is important to spend time with the Provider developing your new relationship as the person providing oversight to the Home Share arrangement.

Goals of onboarding include:

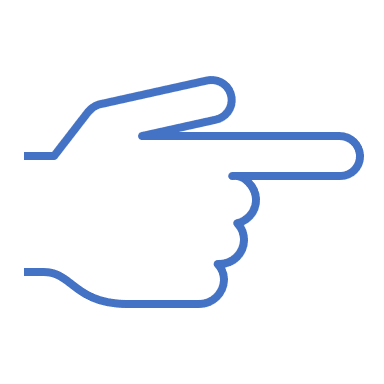
1. Establishing a collaborative relationship to support ongoing interactions
2. Coaching and mentoring them in their new role using the Home Share Contractor’s Guide/Handbook
3. Orienting them to our organization and the resources available to them as a Home Share Provider
4. Setting the structure for ongoing engagement and monitoring
5. Scheduling required training

#### 1. Establishing a Collaborative Relationship

It is critical that the relationship you develop with each Home Share Provider is based on a model of collaboration and mutual respect. While we, [name or organization] have overall responsibility for the health, safety, and well being the individual, we are entrusting the Home Share Provider with the day to day, 24/7 responsibility of providing them with a safe, secure and comfortable home where they can live their lives. We want to be sure the provider feels valued and supported by us.

Be sure your interactions are not ‘all about the paperwork’ or completing tasks with them. Take the time to appreciate them, to reinforce how you see the role they are taking on is a good fit for them, and to recognize the importance of adapting the responsibilities that go along with the Home Share Provider role to their lifestyle and way of doing things.

* Acknowledge the efforts they have already taken to prepare for the individual.



**Helpful Tips**

* Use their Home Share Profile when you are introducing some of their responsibilities to help you highlight some of their strengths that can lend themselves to these responsibilities i.e. *You talk about how your calendar is your lifeline for managing all your kids’ activities. That is great because you already have a strategy in place that can likely work well for tracking J’s schedule if he needs that and also to track when our visits are and when all your reports/invoices etc. are due. Would that work?*
* Be sure you follow their customs and acceptable practices for visiting their home (parking, shoes, coats, appropriate greetings, other practices). Check in to confirm if you are unsure about their preferences in relation to something that comes up.
* Go at their pace. Do not expect to complete all parts of your onboarding in one sitting. Having reviewed the contract with them, you will have a better understanding about their preferred style for absorbing new information. Use this to guide your planning with them so you break the things you want to cover into sizable chunks that work for them. Check in to be sure your plan works for them.
* Make sure that you give them advance notice of the expected duration for each visit with them to do this onboarding so they can preplan around it. Check in when you get there to be sure the amount of time still works and then stick to your planned timelines ….if you are going longer than expected, make sure to check in that this still works for them. Don’t leave it to guesswork. Always ask!
* Summarize sessions, check for questions, and ask for feedback regularly.
* Pay attention to body language and other non-verbal cues and check in regarding them. You want them to feel okay about sharing what is going on for them so make sure you keep things as open and transparent as possible.
* Always acknowledge them when you leave. Make it personal, something specific you noticed and appreciated about them.

#### 2. Coaching/Mentoring them in their new role using the Home Share Contractor’s Guide/ Handbook

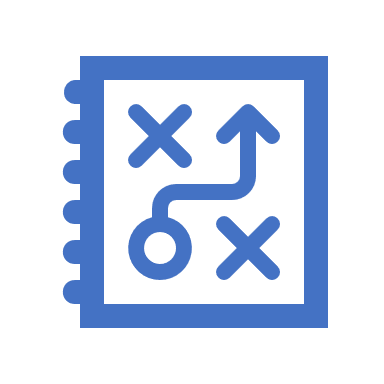
Although the Home Share Provider will have a copy of the Guide/Handbook, it is required that you take time to review each of the sections to discuss these responsibilities in relation to the individual. You want this review to be more than just going over expectations. They can read these! As a Home Share Coordinator/Manager, you have an important role to play as a Coach and Mentor for the Provider as they settle into their new role. Don’t assume they know what’s involved even if they’ve read the guide/handbook. It will likely be all new to them. Knowing they can count on you to help them work things through is essential.

Your role, as part of onboarding, is to set the stage for them to start to assume their responsibilities in ways that work for them. The guide describes **WHAT** needs to happen, the **HOW** needs to be tailored to their personal style. Remember this is their home and not a dedicated workplace. Help them set up structures they can use that fit well in their lifestyle. This groundwork will make it easier for you to fulfill your responsibility in assessing/monitoring their competency in following through on all expectations.

For many new Providers, meeting health care expectations, documenting and reporting specific types of support like medications or support with goals, completing incident or other reports etc. will likely be quite new to them. Going through the specifics can be your opportunity to establish yourself as a resource to them in real and practical ways.

Brainstorm how to tackle these new responsibilities with them, share ideas you’ve seen others use successfully, encourage them to think about strategies that have helped them in the past. By the time you have reviewed each section, they should feel confident and comfortable to take on these duties. Below are some examples:

* They have come up with an easy way to track their support for the Individual’s goals so they can have examples they can share in their quarterly report,
* They have thought through how they will set up a system for med reminders or for documenting their medication administration,
* They have some practical approaches they feel comfortable using to support the individual’s bathing routine etc.

As you are completing each section, document the action plan you have developed with them so you both have a reminder of the approaches they will take to meet the specific expectations. These can then be used as your reference point for your monitoring sessions with them so you can assess their competency in meeting these expectations and/or problem solve new ways if the original plans do not work out.

Throughout your coaching with them, pay attention to how the Provider is responding and adapt your approach to make this process workable for them.



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If you are new to the role of coaching and mentoring, talk with [designated leader] and your peers about potential training opportunities or other resources that can help you feel more confident in assuming this important role with providers.

#### 3. Orienting them to our organization and the resources available to them

It is important to acknowledge and welcome the Home Share Provider to our organization and the role we play in our community. We want Home Share Providers to feel proud of their engagement with us and the ways they contribute to our mission and vision.

Use our website or other promotional materials to engage the Provider in learning about what our organization stands for, our strategic goals and directions, and our recent accomplishments.

Help them to see how they are now a part of our organization and the important role they play in supporting quality of life for the individuals we serve.

Also, be sure to let them know about the resources available to them through our organization (in addition to the role you play in supporting them) – Include all that apply

* Special Events
* Training Opportunities (might include access to internal training systems – ShareVision, Open Futures Learning, Relias, Conversations that Matter etc.)
* Lending libraries
* Newsletters (Home Share specific or Organization wide)
* Promotional Offerings (Employee engagement initiatives that span to contractors)

#### 4. Setting the Structure for Ongoing Engagement

A/ Planning Your Monitoring Schedule – It will be important to review the frequency, purpose and format for monitoring visits for the first year so that the Home Share Provider understands that these are a mandatory part of your support both for them and the individual. Make sure to book the first 30 day visit as soon as possible so it is fixed in everyone’s calendar and indicate that you will be checking in frequently in the early weeks of the living arrangement. Discuss reminder systems that will work and then structure these in your calendar to be sure you follow through with these reminders.

*Ensure you are familiar with the monitoring frequency required by your accrediting body, if applicable*

B/ Exploring Preferred Methods of Engagement – Confirm the preferred methods of communication that work best for the Provider for any check-ins, follow up or other types of contact. Be sure to clarify the importance of having a reliable system in place, one that the provider will check often enough not to miss important information. Note, depending on their cell phone plan, some providers may prefer that you do not use voice but stick to text or email to avoid added costs for them. Find out what works and make sure this is clearly marked on their file so that anyone else needing to make contact with the provider knows any limitations or restrictions.

###### C/ Providing Contact Numbers – It is important that the Provider have ready access to contact information for both emergencies and non-emergencies. Make sure you provide them with these numbers in writing. You can also support them to add them directly to their phone so they can easily find them.

###### Make sure they know the purpose and procedure to use to call the After Hours Emergency On-call number and clarify that this number should be called outside of Business Hours. Reassure them that the On-call personnel will contact you as needed.

#### 5. Scheduling and Documenting Required Training

All Home Share Providers are required to complete mandatory competency based training within \_\_\_\_ of months of the start of their agreement with us. These requirements should have been explained both during the initial screening process with the provider, and again when signing the agreement.

The following confirmation of training will need to be submitted by the Home Share Provider and added to their Home Share Provider Training Record. Typically, these certifications are required in advance of the individual moving in.

Required training completed before start date

* *CLBC Standards for Home Sharing*
* *CLBC Privacy On-Line Training Courses*
  + - * First Aid and CPR

You are responsible for coordinating with family members or external providers such as HSCL or a Behavioural Consultant or Health Practitioner to complete any specialized training to support the Individual. Some of this training will need to be completed before the Individual moves in if it is critical to their care such as specific health care protocols, behavioural support tools, MANDT etc. Others that are less urgent may be scheduled during the first weeks of the living arrangement i.e., exercise routines with the Physiotherapist. Be sure to follow up after these trainings to ensure the Home Share Provider feels confident and comfortable following through on this training and negotiate additional support if needed.

Training specific to the individual

* Add all completed training to the Home Share Provider training record.

Some required training will be completed on a more informal basis as part of your onboarding activities in 1 to 3 above including:

Informal training as part of onboarding

* Program philosophy and values
* Basic health care expectations
* Documentation practices

To ensure these are understood and expectations are being met, be sure to follow through during your next monitoring session to confirm competency has been achieved in these areas and add to the Home Share Provider Training Record.

Because there will be a lot going on for the provider as they prepare to welcome the individual into their lives, it is important to help providers map out their plan for ensuring all training components that they can do independently are completed before the individual moves in such as: (add the ones you use)

Our internal training for contractors

* Online Medication Training (if part of their role)
* Incident reporting

You will also need to book them into any required face to face training according to your organization’s schedule. Recognize that it may be challenging to match our organization’s schedule with the provider. Where there are challenges making schedules work, speak with your [designated leader] about possible accommodations.

Add all completed training to the Home Share Provider training record.

You are responsible for tracking and ensuring all training is completed. Be proactive. Check in and offer support throughout the time frame to address any challenges the Home Share Provider may be encountering with their schedule, their access to online trainings and/or any other aspects of the training. Do not leave it until the last minute. It is important that the Provider feel supported by you and that you are there to help sort things out with them.

This approach helps to foster your relationship while still ensuring that expectations are met.

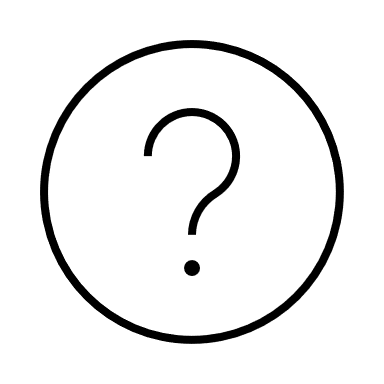
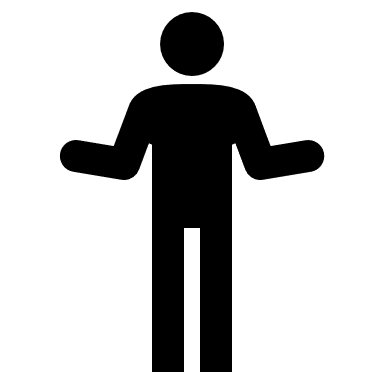
If training timelines are not going to be met, you should know well in advance so you can:

Document the reasons, the action plan you have set up with the provider to make sure they get completed, and the adjusted timeframe in the Home Share Provider training record.

* Report these changes to your [designated leader],
* Get necessary guidance from [designated leader] if you have any concerns about the Provider’s willingness or capacity to complete any of the training.

### B. The Ongoing Role of the Home Share Coordinator

Your engagement with the Home Share Provider throughout the screening, matching, and onboarding processes sets the stage for your ongoing role providing support and oversight for this home share arrangement. It is important that the Provider fully understand and accept your ongoing involvement.



No matter how much you may have emphasized your role in the past, the provider (and often the individual) may start to question your need to be involved once they have agreed and settled into life together. This is quite natural – we are encouraging them to create a life together and we want them to turn to each other and count on one another through thick and thin. These are signs of a successful Home Share.

However, it is important that they understand and embrace your role and see it as a support to them.

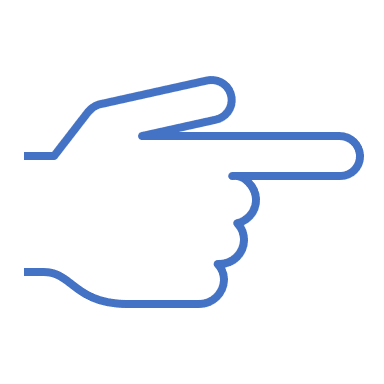
So why is it important you stay involved?

* Providers have a contractual agreement with us and are paid for their services 🡺 This makes them accountable to us for the responsibilities they have undertaken.
* We have an obligation and commitment to ensure the quality of life of the individuals we support and to safeguard their health, safety and wellbeing 🡺 We need to have a regular presence in the home to ensure we meet this commitment while they are living with this provider.
* Providers operate in isolation as contractors 🡺 We need to ensure there are checks and balances in place
* to assist them in their role with the individual so they feel supported and know they can reach out to us and
* to ensure they are consistently meeting our standards of care.
* The role of Home Share Provider is complex and ever evolving 🡺 It is important that the Home Share Provider have consistent access to our support and expertise to navigate the complexities of their role even when they feel confident they can manage issues themselves. It is our job to be there, to pay attention to and proactively offer our support, to explore the dynamics at play, and to offer coaching, mentoring or facilitate access to other professional expertise as needed to ensure the health, safety and well being of both the individual and the provider.
* Changes in the Home Share Provider’s Life can impact quality of care 🡺 Even the most long term and secure arrangements are subject to a breakdown in or a compromise to care when changes occur for the Provider. Without our presence in the home on a consistent basis, we may inadvertently miss these indicators and place an Individual and the Provider at risk due to our lack of attention to these changes.

See more about your role in monitoring and its importance as a safeguard in Chapter 5B.

How Can you Engage Them in the Importance of Your Role?

* First and foremost, make it part of your agreement with them – it is part and parcel of being a Home Share Provider and comes with the territory.



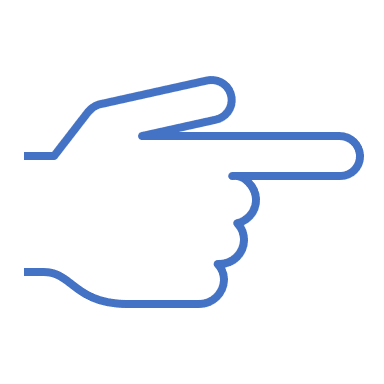
**Helpful Tips**

* Lead discussions about your role by emphasizing your commitment to the success of their home share and to the life of the Individual.
* Introduce your role in monitoring as a support to them, a time to check in and be there for them and address any concerns either of you have about how things are going. Share examples about how monitoring has helped other providers.
* Prioritize your relationship and make a point of acknowledging them regularly (specific rather than generic) so they feel appreciated. (A cheerleader is one of your roles!).
* Use an inquiry and problem solving approach when they are not meeting expectations so they start to see you as ‘on their side’ helping them work through challenges they are having.
* Offer your support to help them meet expectations and follow through with any agreed upon plans i.e., Reminders for required paperwork, Providing examples of quarterly reports.

### C. Engaging and Working with the Individual’s Family/Personal Network

As outlined in the core principles guiding Home Share, part of your role involves helping the Home Share Provider to build a positive and respectful relationship with the Individual’s family and/or members of their personal network, if these are the individual’s preferences:

As part of your engagement with the Individual during intake and later during the matching process, you will have become aware of the level of engagement and relationships family members or members of their personal network have with the Individual. You may also have picked up on some of their needs, the concerns they express with regards to the Individual’s welfare, and their ways of interacting. This understanding of family/personal network dynamics can help to guide your support so that you can help prepare the Provider for what they might expect and in order to provide some proven strategies for engaging with the family/personal network. However, it is important to be sure you do not pass on any pre-conceived judgments about these people who are close to the individual that could influence the Home Share Provider’s impression and initial engagement.



**Helpful Tips**

* If the Provider has not met the family/personal network as part of the matching process, reference the Individual’s Personal Profile to talk about the people the individual has identified as close to them. This approach ensures you are honoring the Individual’s choices around who they want to welcome into their new home.
* Clarify the expectation that the Provider support these connections.
* Share any helpful information that might be useful to guide the Home Share Provider’s interactions. When sharing, make sure to use neutral language that describes your observations rather than your opinion about the relationship. *“I have noted that J will often look to his mom first to check out what she thinks before making a decision”* as opposed to “*Mom is in charge…she makes all his decisions*”.
* Support the Provider to be attuned to existing ways the individual connects with family/members of their personal network, so they don’t inadvertently displace a routine by planning new routines i.e., if the individual has typically gone to the local Farmer’s market every Saturday with their family, encourage this to continue rather then replace it with an activity with the Home Share Provider.
* If the Individual is moving in with the Provider from their family home, you will want to provide this context for the Provider. The family will be going through their own transition which may impact how they feel about and want to engage with the Provider. It will be important for both you and the Provider to be sensitive to this transition so that good relationships based on trust and respect can be developed. You may find that Providers who have been through similar transitions with their own family members will take this in stride while others may need more support navigating these types of family dynamics.
* Ensure that Providers know they can set parameters regarding these relationships that make it comfortable for everyone in their household without denying the Individual’s rights or setting a different standard for them compared to others in the household. These parameters should be negotiated with the individual as part of their transition planning so they feel comfortable to everyone. For instance, late night drop in visits or phone calls may feel disruptive to the household. Establishing some parameters around how early or late these can happen can be a simple solution and would apply to all members of the household. Similarly, an open door policy may feel invasive to some household members. Agreeing that family members/friends should knock like any other visitor can become a ground rule for interactions. See ‘Creating an Agreement: “How We Want to Live Together” in next section.



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Many providers may not have fully appreciated the role that the Individual’s family and friends might play in their life together and may need support to know how best to navigate. This will be especially true if they experience personality conflicts and/or have difficulty relating to some of the people close to the Individual. It is important for you to stay closely attuned to these relationships so that you can ensure:

* The Individual continues to enjoy meaningful connections with members of their Family/Personal Network who matter to them,
* Family Members are treated respectfully and feel included to the level that feels comfortable to the Individual and that works for the Home Share Provider,
* Home Share Providers feel supported in navigating any challenges they experience in their connections with the individual’s family/personal network.

Like all challenges that may arise, make sure to flag and consult with [designated leader] if you are concerned about how best to support the Provider to build positive relationships with Family Members.

### D. Gaining Commitment for Documentation and Reporting

Home Share Providers are expected to follow through with all documentation and reporting requirements outlined in our contractual agreement with them. You will likely have spent time already during your review of the [Contractor’s Guide] helping them to develop systems that will work for them to meet these documentation and reporting requirements.

However, we know that paperwork can be daunting for many providers. Some of the most common issues that we encounter include:

* Providers who express frustration with these additional tasks that they feel take them away from their real role making a life with an individual.
* Providers who are challenged by the process of documentation – they may have limited or basic writing skills and feel overwhelmed by these tasks.
* Providers who have limited organizational skills making it hard for them to remember and follow through on these tasks.
* Providers who have transitioned from direct contractual relationships with CLBC or were foster parents with MCFD. Documentation requirements may have been different in those situations and the provider will be adjusting to new expectations.

The following tips can be used as possible ideas as a starting point for brainstorming with the Provider. Once they know you are on board to help them work things through, they may be more inclined to engage.

#### Tip # 1 Make Paperwork Relevant

Knowing providers may balk at doing paperwork, it is helpful to focus on how any paperwork you require them to complete contributes to:

* quality care for the Individual so they can enjoy a good life together.
* Ensuring the agency maintains a robust history on behalf of the individual to ensure that future supports are well-informed.
* protecting them in their role as Provider.

Tracking and monitoring administration of medications is a good example. This process can feel unduly formal for many providers who take medications themselves or are used to managing prescriptions for family members without all the procedures we require. Taking the time to help them understand the importance of developing clear documentation systems is an important first step to gaining their buy in.

|  |  |
| --- | --- |
| Importance to the Individual’s Care | * Ensures the person’s safety and helps to avoid any slip ups like missing dosages, forgetting to renew prescriptions, etc. |
| Importance to their proof of care | * Provides them with proof that they have followed through as prescribed if there are any questions or concerns about the person’s health and wellbeing and/or care. |

It is good practice to think this through for all the documentation and reporting you require of your providers so that you are able to comfortably promote them as best practice for the Provider and help them to see their relevance to their role.

This could be a good exercise to engage in with your team and/or with a group of your providers so these types of approaches are shared consistently.

#### Tip # 2 Facilitate Writing Supports

While your job is not to teach writing or correct/edit their written reports, you can help providers problem solve ways that they can manage these tasks. Some examples that have proven successful include:



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* Enroll another member of the household to help with writing tasks (ensure all confidentiality measures are in place).
* Have them explore voice to text options on their computer as a way to get their ideas down and then cut and paste into the required documents (this may require you to provide them with electronic rather than paper documents if they usually hand write these).

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* Provide examples of the types of reports they need to complete (Non identifying) so they can see and learn from the ways others have written them.

#### Tip #3 Create Structures to Keep Tasks Organized

Offer different ways that people might help themselves to organize their documentation:

* Reminder apps for their phone can work well. They can set these up so they remember to do all their required paperwork at the same time as they submit their monthly invoice
* Provide a binder that they can use to organize all their paperwork with a section for med admin, one for goals etc.
* Create a buddy system with another home share provider to prompt one another about specific tasks
* Set up e-mail alerts on your case management system that send alerts to them to remind them of specific tasks.
* Schedule monitoring visits to time with specific tasks so you can prompt them.

### E. Reporting Changes in the Household/Home

Another important contractual obligation that Home Share Providers have involves reporting changes in their household. Experience suggests that, while this seems obvious, the reality is that many Home Share Providers don’t necessarily think to report changes that happen over time and may not alert you even though they may have significant impact on the day to day routines of the individual. This is why consistent and regular check-ins and monitoring are so important. Examples of changes that can often go unreported:

* A visitor extends their stay beyond two weeks, perhaps deciding to stay for the season or indefinitely,
* An adult child returns home for the summer or indefinitely,
* A partner/spouse moves away,
* Relationship turmoil including divorce or separation,
* Death of a pet,
* They are considering becoming a foster family for a child in care in addition to providing home share,
* They are considering acquiring a pet,
* A Provider or their spouse loses their job,
* Someone in the household is diagnosed with a serious illness,
* A significant family member of the provider is sick or passes taking the Provider’s attention away from their household.

These kinds of occurrences are important to track and monitor. Most often, those of us who face significant changes in our lives, may feel we can manage or tend to roll with them and may not recognize their impact on others including those in our care. It is essential that you, as Coordinator/Manager, take note of even the subtlest of changes in the household in order to be proactive in providing any needed support and/or addressing any negative impact the changes may be having on the Individual. The Vulnerability and Safeguards Assessment is a vital tool in recording the shifts that occur, the consequence for the individual and/or provider, and the safeguard strategies initiated.

It can help to acknowledge with the Provider that changes happen and are inevitable in any household over time. You can then emphasize the importance of keeping you in the loop by giving some examples of experiences you have had where knowing about a change could have helped address an issue with an individual before it got out of hand i.e. *An increase in an Individual’s irritable bowel condition turned out to be directly linked to the presence of the provider’s aunt who had come to stay for the summer. She was sleeping in the spare room next to his washroom and we discovered he was worried he would stink up the bathroom so was avoiding going and ended up with severe constipation. You knew bathroom privacy was extremely important to the individual and might have been able to help troubleshoot this issue in advance and/or identified the root of his stomach upset much sooner had you known.*

### F. Supporting Self Care

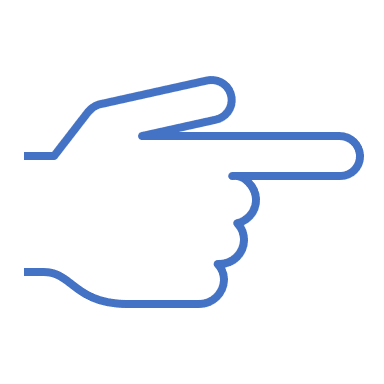
Taking time to talk about plans for self care is an important part of onboarding. Like anyone embarking on a new role, Providers may be all consumed by the immediacy of this new adventure and not be considering the way things might change for them, personally.

It will be important to let the provider know that it can sometimes take up to a year to fully adapt to the new routines of sharing their home. This is a major life change and they will need to be patient with themselves and the individual to allow the time needed for everyone to adapt. Reassure them that the 'stress' from forming this new relationship will get better over time.

Because they will be assuming a 24/7 life with the individual, it is important to not just assume that ‘respite’ is the answer. We will talk more about Respite in Chapter 5A . In this section, we want to emphasize the importance of ongoing self-care over and above respite. We know that, while having scheduled respite time is important for the long term stability of the home share arrangement, it is equally important to explore their daily routines and the importance of building self care throughout. One way to do this is to help them reflect on the ways they like to enjoy time alone, or with their significant other/family members, that may now be less available to them with the addition of a new household member.

* How will they make sure these, or equivalent amounts of time, can still be available to them?
* What adaptations will they need to make?
* How can they work with the Individual’s daily schedule/regular connections with family or friends to carve out some time for themselves?
* How will they know if it is working or not working?

Often times it is helpful to link the Provider with an experienced Home Share Provider who can share some of their tips. Similarly, hosting a Home Share Provider Group focussed on self care, can stimulate ideas and help the Provider to learn from others. Making these connections can also support the Provider to develop a network of support for this new role.



**Helpful Tips**

Note: See Chapter 5A.3 – for specific details on Respite.

### G. Addressing Any Flags or Concerns as You Get to Know the Provider

There may be occasions when, in the moment and/or after leaving a visit with the home share provider, that you have a ‘gut feeling’ that points to a potential red flag. It might be set off through body language or a comment that doesn’t stand out in the moment but comes to mind after hours when reflecting on your day.

It is essential that you do not dismiss these flags. They may amount to nothing upon further investigation and/or may point to a vulnerability related to the home share provider or the individual where important safeguards need to be developed. Make sure to document and follow up on these flags. Be sure to consult with your [designated leader] or other members of your team to help you to plan the best approach and to make sure they are in the loop and can help to guide the process followed.

Make sure to review the next chapters of this handbook that discuss safeguard planning. Your ‘gut feelings’ play an important role in supporting the health, well-being, and safety of all involved and should be attended to.

## 3. Navigating Special Circumstances

### A. Conflicts of Interest – Our Employees and Relationships with Providers

Note: This section only applies if your organization accepts providers who live in the same household and/or are immediate family members of an employee of your organization.

All Providers who live in the same household and/or are an immediate family member of an employee of our organization, must declare this relationship as part of their initial application. In situations where this relationship develops after a home share is established, the Provider is obligated to declare this relationship i.e., marriage to an employee of our organization. These obligations will have been covered with the Provider during the assessment phase but should be reviewed during onboarding at which time you want to be sure the Provider has signed our Conflict of Interest Form and confirmed agreement to our Safeguarding Dual Relationships Policy. It will also be important to take the time to explore how they see navigating this relationship so they can ensure they follow our policy:

* all communications, expectations and follow through regarding the care of the individual are assigned to the Provider as the official Contractor and not to our employee.
* the employee will not provide service at [name of organization] as an employee for the individual while they are also living in their home supported by their family member as the Provider.

As part of your ongoing monitoring, you will want to be sure to include a review of this relationship to ensure the provider is adhering to our policy.

### B. Families as the Provider

All contractual agreements with family members to provide home share support to an Individual (their family member) must be authorized by CLBC. In some cases, CLBC will already have made the arrangement with the family and will send them to us with an accompanying authorization and funding allocation.

Despite this confirmation from CLBC, as outlined in Chapter 3 on Recruitment and Assessment of Providers, we have a practice of conducting a full assessment of this Family Provider prior to confirming and signing off on a contractual agreement with them just like we would with any applicant. This process is an important for safeguarding the family member as the Provider and [name or organization] as the oversight body for the home share arrangement.

Once you have completed all the necessary steps and are ready to move forward with a contractual agreement with the family member, you will want to have a frank discussion about your ongoing role with them and explore together how to make this work. They may be under the impression that, because of their unique situation as a family member, they would be exempt from the level of training, monitoring, and reporting you expect of other Providers. You may find that some families may question or challenge your need to be involved and/or their need to be accountable to you. Navigating this complex dynamic takes thoughtful preplanning to do well. Keep in mind these recommended strategies:

#### Acknowledge and Recognize the Family Member

It can be really helpful to start the onboarding process with family members by naming this unique situation and the advantages they will have in orienting to their role because of who they are and their existing relationship with the Individual. Our focus here is on making sure they feel acknowledged and validated for the skills, experience, and commitment to their loved one that they are bringing to this new relationship with our organization.

#### Focus on their New Role Specifically with Our Organization

Contracting with our organization will be new to the family member. Focussing attention specifically on this new role with us, makes room for exploring how they can align their practices to our systems in much the same way as we do when onboarding all providers (i.e., exploring how they can adapt medication admin practices they may already have in place), so they meet the documentation requirements we have. This approach helps to frame the conversation around working with us rather than on their skills in managing responsibilities they may have had a lifetime of experience doing!

Like any provider, you want to establish yourself as a resource to the family member so that they feel well prepared to meet their responsibilities as a contractor with us in ways that work for them.

#### Check in About any Support They Require in Relation to the Individual’s Care Needs

While we want to recognize their experience, we also want to be careful not to assume that the family member feels confident and comfortable in all aspects of their role with the individual. Comfort levels may vary based on the relationship the family member has with the Individual and how current their experience supporting them in their daily life is. Check out what they think they need in terms of any specific support to meet the individual’s care needs – perhaps there are new things emerging for the individual that the family member might appreciate some guidance in handling, perhaps they are just getting back into the individual’s life after a period of absence and would like some guidance in how best to support them in specific areas. As much as possible, take the lead from them and adapt your support accordingly.

#### Remember How Your Role Can be of Benefit to Them

It can sometimes be difficult for family members to fully appreciate how your check-ins and monitoring can be of any help to them. They may simply see these, and all the documentation you require, as the hoops they have to go through to be able to continue to support their loved one at home. To avoid second guessing yourself, it is important that you appreciate the value of your role and how you contribute to the success and longevity of this home share arrangement. Here are some examples. Add your own ideas here as well!

* Building on and complementing their depth of experience supporting the Individual by reinforcing their care and offering other perspectives to enhance the individual’s life.
* Providing important safeguards for the individual and for the family member by being an extra set of eyes.
* Stepping in and offering support as needed to address any conflicts or concerns.
* Providing collaborative input if the individual’s needs change and resources are required to stabilize the living situation for everyone.
* Overseeing and ensuring that all contractual obligations of the Provider are met.

If you are feeling particularly challenged in knowing how best to build a good working relationship with a family member who is in a Provider role, be sure to consult with [designated leader] for guidance.

## 4. Chapter 4B - Q and A Contracting with and Onboarding Home Share Providers

What if the selected Home Share Provider has concerns with any of the contract language?

**Remain Neutral and Focus on Clarifying Concerns**: Do not try to defend, minimize, or convince the provider. It is important that they enter this agreement making a fully informed choice for themselves. Instead, find out what is at the root of their concern so you know whether it is an issue you can clarify (i.e., specific expectations that you oversee) or if it requires involvement of others (i.e., funding level, termination language, etc.)

**Remind them about getting legal/tax advice**: As already emphasized, it is not within the scope of [Name or organization] to offer legal or financial advice. You are prohibited from offering interpretations of the language except for the explanations we have provided in the Home Share Contractor’s Guide/Handbook. Always recommend they seek legal counsel or tax advice.

**Report to your [Designated leader]**: Make sure you keep your [designated leader] informed of any and all issues that you encounter in relation to a Home Share Provider’s misgivings/concerns about the agreement. It is essential that they be aware so they can determine if and how they will be involved.

**Document these discussions in writing**: Make sure you keep a record of all discussions and decisions made. Retain these with the signed agreement if the Provider decides to proceed. Otherwise, make sure this documentation is held on our [Name of case management system or tracking form you use to track each Home Share Candidate/applicant]

**If the selected Home Share Provider Chooses Not to Proceed**:

* Confirm with your [designated leader] if and with what criteria they will remain on our Pre-Approved Provider’s List.
* Document this decision and the reason for it on the Provider’s Record and on our [Name of case management system or tracking form you use to track each Home Share Candidate/applicant].
* Inform the Individual and plan next steps for developing and exploring new Home Share matches.

**Clarify and problem solve any barriers:**  Focus on how you can help them meet these expectations rather getting into a confrontation. Listen to their rationale for the delay and what they see might be a good solution for addressing these barriers.

* If they reference the timing of face to face sessions, the time it takes away from their other responsibilities, or the costs in getting respite to attend, as the barriers, perhaps explore alternate options for making sure it is completed. Are there videos of the face to face sessions they could watch? Could the practical part of this training then be done in person with them in their home?
* If they tell you they know all the material and shouldn’t have to do specific training, be curious and explore this further. You may find some legitimacy to their claim and could consider how to assess and document their competency in practical ways. If you continue to feel it is a necessary training for them despite their resistance, explain the importance of it and why it matters to their role(even if you have already done this numerous times). Help them problem solve how they can make it work i.e., what have they done in the past to get through something they dislike? Do they have concerns about the format or having a quiz at the end? Is there something else getting in they way? etc. Try to address the issues that arise with the clear message that it needs to be done and how will we make this work.
* Consult with [designated leader] for guidance and advice including the potential of having to provide notice on the contract.

What if the Provider does not follow through with required training despite your reminders and adjustments to timelines?

**Acknowledge their role as a contractor:** Agree with them that being an independent contractor does mean there is a clear distinction between them and an employee of our organization. Use the Home Share Contractor’s Guide/Handbook to review these distinctions and what they mean i.e., we can’t dictate how or when they do the assigned work, but we can set deadlines for when specific tasks need to be completed and the standards they must meet.

**Focus on their contractual obligations:** Reference their contractual agreement with us and talk about the requirements under this agreement. Explain that, as a contractor, they have control over how they meet specific expectations but they must meet expected standards i.e., they don’t have to use the forms we supply them to track medications but they do need to meet the standards around medication administration. Our form is one tool they can use. They still have an obligation to meet the standards that our form ensures they meet.

**Ensure your contractual agreement reflects all requirements**: Make sure to flag any need for updates in our contract template and accompanying Guide/Handbook and send these to your [designated leader]. As an example, ensure that the clause regarding required training is included in your contractual agreement with them as either a schedule/addendum or in the [Home Share Contractor’s Guide/Manual] that forms part of the agreement.

What if the Provider claims they do not have to follow your procedures or participate in training because they are an independent contractor, and you are not their supervisor?

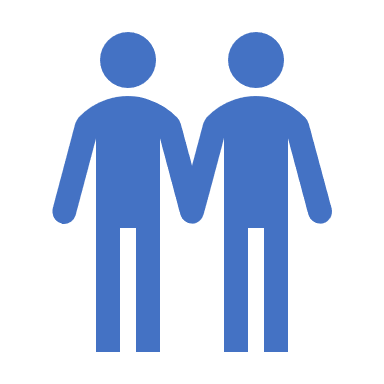
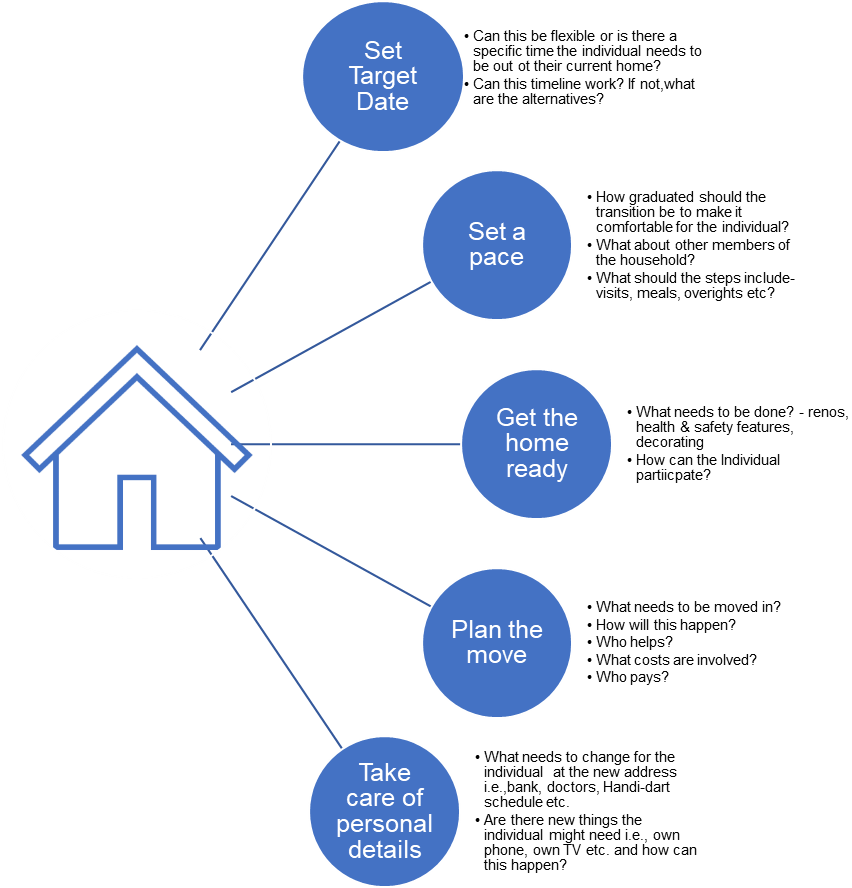
# Chapter 4C: Establishing the New Living Arrangement Together

## 1. Transition Planning

### A. Things to Think About- The Process

For many of us, and in particular many of the individuals we support, transitions can be challenging if they are not planned well. This can be true even if it is a transition to something the individual is excited about and wants to have happen like moving into their new home.

Your role is not necessarily to plan the move but to offer guidance and support by helping all involved think through the key components that will be important to address. Every transition and the sequence of activities will be different. There is no right way to support the Individual and the New Home Share Provider/household to begin their lives together. They will need to develop their own roadmap that works for them. The following diagram has been deliberately built to show some key considerations and not the order they might be addressed.



### B. Making a Good Start

We believe that getting off to a good start increases the chances of success over the long term.

Whether the transition phase is extended or more condensed, you can expect some logistical and emotional impact for everyone involved as they settle into this new arrangement. Helping them to expect and prepare for these eventualities can be an important part of your role.

It is helpful to have some examples of how other people have managed the move and some of the bumps they experienced so you can help to normalize the bumps and adjustments that happen along the way. Gather stories from other Home Share Providers about their experiences or some of their helpful tips that you can share. Better yet, link them to another Home Share Provider so they can hear these stories directly and ask questions etc.

Make sure you review the Home Share Contractor’s Guide/Handbook, our Transition Planning Form or the following checklist to help them think through some of the logistical details:

Encourage them to:

* Spend time getting to know each other so they can deepen the relationship they are starting to have. This can help the Individual feel more at ease in the home and more familiar with some of the routines. A graduated approach starting with visits, lunch and/or dinner together, and other shared activities and then moving to an overnighter or weekend stays as time allows can be one approach.
* Take care of any painting, renovations, or physical adaptations that they want or need to have done before the move - involving the individual can be a good way to build relationships (paint colour etc.).
* Make sure they talk about and work out how the costs of moving will be dealt with.

*Building a Positive Relationship is an important first step*

* Spend time with their household and the individual deciding how the individual’s personal space and privacy will be arranged – it will be important to ensure that all members of the household understand and agree to respect the individual’s personal space and belongings including not using their belongings in any way.
* Arrange the date when the individual’s personal effects, furniture, pets will be moved in so that they have time to complete a thorough inventory of all their belongings for their records and for the individual to keep.
* Plan the logistics of the moving day and how best to make this happen so everyone is comfortable.
* Make a list of observations and questions to discuss with your Home Share Coordinator/ Manager that arise during this planning so you can work through them together.
* Find out about the individual’s identification documents and how these will be held, who is responsible. These should include BC Medical Card; Birth Certificate or Passport, Medical Alert (if applicable) and other relevant documents such as BCID, Social Insurance Card or Gold Card. If the individual does not have any of this ID listed, talk with the Home Share Coordinator about how to handle.
* Work together to create their own agreement for how they want to live together – provide some examples of how others have developed these.
* Plan a way to celebrate the move and their new life together!!

C. Creating an Agreement: “How We Want to Live Together”

Best practice suggests that shared living arrangements have better success when all members of the household think through some of the expectations that they have of one another in advance. Not only does this process support increased understanding about one another’s needs, it also helps underscore the equal relationship the individual holds with others in the household. They, like everyone else in the household have rights and responsibilities towards one another.

To help set the stage for this process, you can introduce it as part of transition planning and help all parties to decide the format that might work for them and the process they will use. Your role is not to facilitate this discussion/process unless they ask for this type of support. Your role is typically to share ideas and some resources like sample agreements, lists of possible topics etc. and then to follow up to see how it went. It is also helpful, if they are willing to share their agreement, to have a copy. It can be a good reference when you are doing check-ins or monitoring visits to guide discussions around how the relationship is going.

#### Format and Approach

There is no right way to develop an agreement and/or to share it. They should be encouraged to adapt to their preferences and comfort levels so that it feels useful and valuable for them. It might be a poster, a recording, a booklet etc. Some suggestions for getting started might be to:

Our Agreement



* Set aside time to do it all at once using this section as a guide and writing things down as they agree to them.
* Choose 1 topic a week to reflect on individually and coming together at the end of each week to discuss and agree on them.
* Use a deck of cards with the topics and picking 1 card a night to invite discussion over a shared meal with all members of the household.
* Take time individually (or with support from a friend/personal support network if preferred) to think through the topics and then share their ideas with one another other to make an agreement.
* Try out different approaches to explore each other’s thoughts about the various topics such as mind-maps, collages, music/songs that speak to what matters to each of you, etc.

Note: Many of the individuals we support may not use words to communicate and/or may find it more difficult to articulate their needs, wants and concerns using words. How a person communicates should not exclude them from participating in this type of an exercise. As the [Home Share Coordinator/Manager] part of your role will be to help the provider learn about the ways the individual communicates (such as their body language, cues, and behaviour) so that they can engage with them effectively to learn what matters to them in order to develop their agreement together. This coaching is an important part of overall relationship development that can lay the groundwork for everyone in the household to engage with the individual in ways that work for them.

#### Topics to Cover

There are a whole range of topics that can be covered off in an agreement. It is best to brainstorm a list of possible topics and then add things as you go. If there have been some important preferences identified in the Individual’s Profile and/or the Home Share Profile make sure they are included as topics.

Some possible broad topics that can be broken down into smaller pieces include:

|  |  |
| --- | --- |
| * How we talk with each other | * How we respect each other’s privacy |
| * How we deal with conflicts/concerns | * What our rules will be around guests and visitors |
| * How we respect confidential info about each other | * How we give each other feedback |
| * How we offer support to each other | * What we do if we don’t like how someone is treating us |

As mentioned above, there are no right ways to create an agreement. Spending time exploring these topics or others that come up is as important as any agreement that is written. It is also important to help them understand that these agreements can change over time as they get more comfortable with one another and learn what works when interacting with and living their lives alongside each other.

### D. The Home Share Coordinator/Manager Role – Defining Your New Relationship

As much as possible, aside from helping them to think through and plan the various components of transition, it is best to take a step back from active involvement in the actual transition process so that the new household members can start to build their life together. It will be important to let both parties know about this intention especially if your engagement with both parties has been quite substantial until now.

Stepping back from active involvement does not mean a hands-off approach. Your role simply shifts to a check-in and monitoring role so that you can effectively support this Home Share arrangement and proactively troubleshoot any issues that arise as they establish their life together. This will be your ongoing role throughout the duration of this shared living arrangement.

#### Check-ins

Check-ins are informal opportunities to touch base with the Provider and the Individual to find out how things are going and to explore any concerns or issues arising.

Timing:

* During the transition stage prior to final move in, it is helpful to time check-ins based on the graduated timeline they have chosen. Touching base at specific junctures (i.e. After several visits, after the first overnight etc.) can be helpful for assessing how things are going and offering support as needed.
* After the move, you should plan to do regular weekly check-ins at a minimum with both the provider and the individual separately during the first month and longer if warranted. Be sure you build this into your schedule and increase the frequency if warranted so all parties feel they have the support they need.

Check-In Methods: As part of onboarding, you will have established preferred methods of communication with the Provider and will have done the same with the Individual at intake. It is important to follow these when checking in with each of them unless they prove unsuccessful in facilitating timely contact. If this happens, take time to explore alternative options with them so you can have timely contact.

Check-in Topics: Check-ins should flow naturally guided by what is happening in the household at the time. Keep notes of each contact and follow up on items addressed in the previous check in so that there is continuity in your support.

Documentation: Make sure that all check-ins are documented on the [Contact log] according to our timelines.

Monitoring Visits: Formal monitoring involving scheduled visits is expected to take place at the time of the move, within 30 days, again after 90 days and then every 3 months for the first year of the Home Share arrangement. Details about conducting monitoring visits are in Chapter 5 B.

Note: Throughout this transition phase, you may also be setting time aside to continue with the training and onboarding of the Home Share Provider. These two activities may happen concurrently over the first few months.

## 2. Chapter 4C - Q and A Establishing the New Living Arrangement Together

What if the individual starts to get nervous or resistant about the move during the transition phase?

**Learn from Other Transitions:** Talk with the Individual and/or others close to them to find out their experiences with transitions. Sometimes going too slow can heighten someone’s anxiety and it may be better to pick up the pace and have them move in sooner so they aren’t worrying about it. In other cases, the transition may be happening too quickly and the Individual needs more time. Pay attention and learn from the Individual.

**Be curious:** It may be that something has occurred during one of the visits or there is something bothering the Individual. Don’t just assume it is the transition. Take time to explore what might be causing their nervousness i.e., they don’t like the cat to go in their room or people are making too much of a fuss about them. Give the individual space to talk about what’s going on for them so you can try to work this through.

**Seek guidance from [designated leader] or your team**: If you are concerned that the placement may be at risk, consult with your [designated leader] and/or the team so that you get their perspective on what you are seeing and don’t miss anything critical.

What if both parties want to jump in and are not interested in a transition phase?

**Trust the process:** Our guidelines around successful placements are just that. If, after carefully considering if they want to live together, both parties feel they have had enough visits and opportunities to meet and they simply want to move forward, don’t get in the way. Just be sure you have time with both parties separately to be sure they both feel the same way.

**Promote the Agreement to Live Together:** Be sure that, while they are settling in, they take the time to review and put together their own agreement to live together so they don’t miss this important part of the transition process.

**Establish Regular Check-ins**: Follow through with setting up regular check-ins so you can troubleshoot any signs of issues arising. Make sure you have a regular presence over and above the scheduled monitoring visits using the preferred methods of contact established with each party.

**Step in only if asked:** Don’t assume you need to problem solve for them unless they ask you to help work it out. This may be the first opportunity for them to figure out how they will problem solve together - you might be surprized with their creative solutions. If they have alerted you to the situation, simply monitor and check in to find out how things are going. Acknowledge their successful problem solving if they are able to resolve the issue.

**Add a section to your Move in or Transition Checklist on this Topic**: To facilitate both parties to work things out together, create a checklist that offers tips on ways to resolve these types of issues that might include things like:

If all your belongings can’t fit in your room:

* Is there a storage space the individual could use that is easy to access and could be used for their private storage
* Are there items that the individual is willing to share that could be in shared spaces and used by everyone if everyone using the space is willing
* Could some items be left with family and used on visits or when needed i.e., camping gear

**Offer Guidance if Needed**: Participate and/or facilitate problem solving only if needed. As much as possible, offer tips that encourage them to work together to think things through.

What if the Individual has too much ‘stuff’ to fit in their room?

What if things get off to a rocky start and both parties are second guessing their decision?

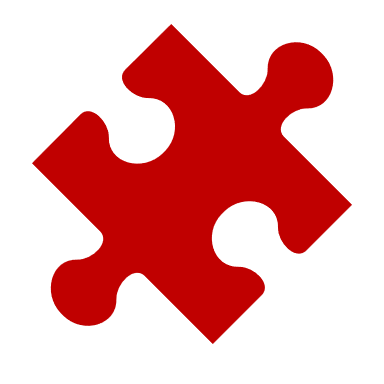
**Stay focussed on the process:** Expect that emotions are heightened during the transition and try to normalize this experience for everyone rather than getting caught up in any issues identified. These issues may well be important to explore at some point. However, initially, it is likely better to help them to tune into what’s going on for them emotionally and how they think these emotions may be impacting their response to situations. Unless you learn or believe that there has been a violation of rights or a serious threat to people’s health and safety, encourage them to stick with it and use these issues arising to get started in learning how to problem solve and resolve conflicts together.

**Be a calm and steady presence for them:** Take things in stride and stay calm and consistent in your interactions so they feel supported and feel confident that you are there for them.

**Encourage them to give each other time**: Stay positive and optimistic. Help them to reframe the issues as ‘growing pains’ and encourage them to take time.

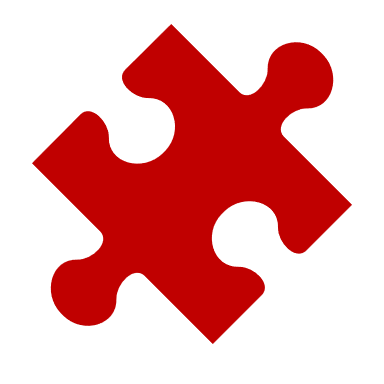
**Link them to others who have successfully navigated rough starts**: Draw on any Providers and Individuals who have successfully navigated a rocky start who would be willing to share their experiences and how they worked to resolve them.

**Increase the frequency of your check-ins**: Make sure to increase the number of check ins you have with both parties, talking with them separately and together. This practice helps them know they have support and also allows you to offer any necessary resources and support to address any challenges they may be experiencing.



**Supporting and Monitoring the Living Arrangement**

**Chapter 5**



**Supporting and Monitoring the Living Arrangement**

# Chapter 5 A: Supporting the Living Arrangement

## Promoting A Good Life: The Most Crucial Support

Perhaps the most potent and significant support that can sustain the home share relationship is helping the individual to cultivate a rich life, enhanced by strong connections to their community. Their fulfillment and personal experience of being valued, belonging, and making a contribution, will enhance their quality of life. And, in turn, their home share provider will have a chance to support and promote the values and vision of our organization’s commitment to citizenship, rights, and meaningful participation for everyone we support. The connections that can emerge from successful engagement with neighbours, workmates, fellow parishioners, and others all serve to gird the intention of home share and reinforce the power of rich relationships. They provide informal and natural safeguards for the home share relationship as well. Our role must always emphasize the power of connections and community in the lives of the individuals we support.

## 1.Looking after the Relationships

All relationships require nurturing and attention to help them thrive. This is just as true with a home share arrangement. Everyone involved is going through a transition, making adaptations to the new dynamics in the home, and getting to know one another. Your support can make the difference to how everyone feels about the early days of the shared living relationship, as well as on an ongoing basis. Exercising finesse, using your intuition, reading the signals that are being sent by the members of this new household dynamic, and following our monitoring procedures, are all components of providing the right amount of support to sustain the relationship.

#### Continue to frame your role as multi-dimensional

You are a support to both the individual and the home share provider. You act as a liaison with resources, provide access to training as required, and also monitor to safeguard everyone. If the home share provider understands that you are as keen to ensure success as they are, and see you as helpful, it will encourage them ask for support when they need it.

Emphasize that all questions are valuable and valid. Some home share providers may feel reluctant to ask for support or clarification about aspects of their role because they worry it may be perceived as a demonstration of incapacity on their part. They may worry that they will lose the contract if they have questions or need help. Given that many home share providers may not have had very much experience with individuals with developmental disabilities, or with the role of a private contractor, it is reasonable to assume that there will be questions. Help create an environment that feels safe for them to explore and inquire.

Spend time understanding what’s working and where there are questions or where either party is feeling less confident/comfortable: This will be important for both the individual and the home share provider. Ask about what things are working well and offer positive reinforcement for those wherever possible. Also inquire about what isn’t as successful as was hoped. Problem solve ideas together.

Inquire with family and members of the individual’s personal support network if appropriate and involved. Be curious about what these people are noticing and consider if there might be suggestions that could help support the home share living situation. Welcome their input and ideas as contributions that promote success.

Seek out collateral voices for their opinions and observations. If the individual is using other services we provide, such as employment or community inclusion, gently probe with those team members to inquire about their sense of the relationship and what feedback they may be receiving from the home share provider or the individual. As appropriate, obtain the individual’s permission to check in with other agencies who may be providing supports to them to get their perspectives on how the relationship is going. These extra eyes act as an important safeguard and can offer unique perspectives on the relationship from another viewpoint that isn’t part of the formal role you play.

Access community resources and amenities: Part of offering support to home share providers and the individuals they support is having a strong understanding of what your community offers in the way of activities, groups and organizations, resources, and services.

If your community has a directory of services, ensure you maintain access to the most recent version of this whether it is online or in hard copy. Exploring the range of resources that are available helps to provide suggestions about new activities, opportunities, and options that can enhance the quality of life for the individual and expand the range of ideas for shared adventures. See Chapter 8.1E for more information about Community Resources.

## 2.Trouble Shooting and Problem Solving

It would be wonderful to imagine that every home sharing situation will be problem free, however this is an unrealistic expectation. Building a positive and effective relationship with all the parties to the home share arrangement provides a solid foundation from which to trouble shoot and manage problems when they arise. The quality of the communication, and the comfort the home share provider and individual have in talking frankly with you, will assist in heading off issues before they become unwieldy, and in resolving them when there are conflicts.

A new relationship may have a ‘honeymoon’ period when people are getting to know one another, and everyone is working hard to make the best of their new home life. As is often the case, when people get more comfortable and familiar with each other, bumps and disagreements might begin to emerge.

The transition planning phase will have provided opportunities to think ahead about likes and dislikes, the individual’s support needs, and imagine the rhythm of life together. It should also have included the new household thinking together about how they want their life to look like and crafting a shared agreement which helps manage issues when they arise.

Not every issue that comes up will, or should, require your intervention. It is important that the home share provider and the individual learn to resolve the day to day issues and develop the confidence, trust in one another, and skills to do so. From our experience, the day to day problems that tend to emerge include things like:

* Noise around the household e.g., volumes of music, tv’s, etc.
* Maintaining shared spaces e.g., cleanliness, what’s ok and what’s not
* Managing responsibilities in the home e.g., shared chores and personal tasks like laundry or kitchen clean up
* Rules around visitors to the home

Encouraging the home share provider and individual to work out resolutions to these potential issues, prevents them from escalating into bigger problems that threaten the long term stability of their living arrangement.

Your check-ins, especially at the beginning of the relationship, help you get a sense of where the pinch points might be in the future. You can circle back in your scheduled monitoring visits, to ensure that the suggestions and resolutions have proven to be effective.

### A. When should you get involved?



You can and should play a role in helping resolve issues, especially when their scope and severity threatens the stability of the home share relationship. These types of circumstances are sensitive to help manage and should be thoroughly documented to provide:

* a record to guide your ongoing support to everyone involved,
* a record of the circumstance(s) and decision or actions taken, and
* details of the follow up provided.

Situations where your involvement is important include:

#### 1. Worsening conflict that escalates into regular arguments.

If your check-ins with the home share provider and/or individual relay incidents of regular, intensifying conflict between people in the household, this requires your immediate attention and intervention. As previously discussed, conflict is not necessarily a bad thing as it can clear the air regarding a specific situation. However, if it escalates into regular arguments that impact others in the home and create ongoing tension, this is a signal to ask for time with the respective parties, both separately and together, to assess the situation, consider solutions, and identify resources that would support everyone to manage their interactions. This may include mediation, behavioural support planning for the individual, additional training for the provider, reviewing the respite provided, and/or requesting additional respite funding from CLBC.

If you are new to the mediation role, talk with [designated leader] and your peers about getting support to help manage this situation as these can be complex to unravel and resolve.

#### 2. Intrusive behaviour on the part of friends and family members.

As we discussed in the previous section, families can and should play an important role in the life of the individual wherever possible. However, the transition from the family home, or other living environment, to a home share can be complicated to navigate for some more than others. Ambivalence about the move, worries about how their family member is coping, and/or learning to navigate new boundaries and roles can all have the potential to create tension and feel intrusive to the home share provider and/or individual. As part of your engagement with the individual, and their family/personal support network, during intake and the matching process, you may have already picked up on some of their needs, the concerns they express with regards to the Individual’s welfare, and their ways of interacting.

It is important to get more information from everyone in order to understand what is occurring that is challenging, how the family and home share provider are responding, and what, if any, expectations were agreed to about privacy, visits, phone calls, and family involvement. If these areas were not previously addressed among the parties, it may be useful to start by introducing a standardized checklist that they could review together with or without your support. This approach can be helpful in supporting all parties to appreciate that this:

* Is common when getting accustomed to this new arrangement (common enough that we have developed a checklist)
* Takes thinking through
* Involves give and take
* Is a proven way of helping to build strong and mutually respectful relationships

As with other sensitive situations, you may be asked to help mediate a discussion to help reset the relationship. If the situation is complex, or you are unsure about how to approach it, seek advice from your colleagues and your manager.

#### 3. Behaviours that display disrespect and disregard for everyone’s property and person.

Without a doubt, if the home share provider, the individual receiving support, or members of their family or personal support network engage in actions or behaviours that impact the personal property, rights, or safety/wellbeing of any party, this represents a serious matter that requires further investigation. If an issue of this nature is reported to you, it will be important for you to conduct a thorough review of the circumstances, gathering information about what occurred, the causes, and impact in order to determine what follow up is required.

As much as possible, the focus here is on exploring ways to work through any misunderstandings and/or underlying issues that may be prompting these actions or behaviours. Your response to concerns of this nature should include reviewing the behaviour from a learning perspective. For instance, you may learn that the other members of the household have a practice of entering each other’s personal spaces freely and apply the same approach to the individual’s space, but the individual finds this invasive and uncomfortable. Helping all parties to work through this while ensuring the Individual’s right to privacy in their home can be a very positive learning experience for all.

Depending on the circumstances involved, you may need to report the concern to our agency's CLBC Analyst or submit a Critical Incident Report and complete any related follow up as per our protocol. There may also be times specific interventions such as behavioural support strategies or involvement of other professionals might be warranted to address an issue.

## 3. Supporting the Use of Respite

Respite represents an important support to any home share setting, allowing everyone the benefit of time apart from one another to regroup and shift into another mode of activity to support their health and wellness. Part of your responsibility is to encourage home share providers to access respite on a regular basis. Respite can be especially important in situations where the individual may have more complex support needs that impose a significant demand on the home share provider.

Our organization [does/does not] provide coordination of respite. [If you provide coordination, insert details of how this is arranged and the process]. [Note whether you hold respite funds and release payment when a receipt is provided] or if the respite funds are built into the monthly payment to the provider and, if so, any documentation you require to confirm use of respite and the frequency of this required documentation. The Terms and Conditions of our contract with them will specify this role and if any financial resources are part of the contract to pay for respite.

Typically respite providers are recruited in a variety of ways including: word of mouth, the home share providers personal network, or from the membership of our employee group.

Securing respite and monitoring the performance of the respite support, is the responsibility of the home share provider. There are several components to confirming the responsibilities associated with their oversight of a respite provider. Although the home share provider will be in charge of how they document their due diligence, it can be helpful to provide them with the core components of what is required.

Our recommended check list for respite management by the home share provider includes the following components:

| **Considerations** | **Best Practice** |
| --- | --- |
| **Term** | Their agreement should provide details of the term and how notice of termination would be executed. |
| **Services** | The agreement should define the expected services to the individual. |
| **Relationship to HS Provider** | The agreement should acknowledge their status as an **independent contractor** and not as an employee of the Home Share Provider, our agency, or Community Living British Columbia (**CLBC**). |
| **Scheduling the Respite Services** | The agreement should define that the home share provider will connect directly with the respite provider to schedule their time with the individual. It is advisable to state that there aren’t any guarantees with respect to the number of hours which will be required. |
| **Fees** | The fee agreement should be defined, including if the rates differ depending upon what is provided e.g., overnight supports. It is typical that expenses are not compensated for unless agreed to in advance by the home share provider. |
| **Insurance** | Terms associated with the operation of a motor vehicle while providing respite services should be defined, including clean driving abstract, amount of 3rd party liability coverage, and Personal Optional Protection under the *Workers Compensation Act.* |
| **Background checks and Responsibilities** | Consent to provide the background and reference information necessary to ensure that all legal requirements associated with providing respite services. This includes a criminal record check, driver’s abstract, proof of 3rd party vehicle liability insurance, First Aid certification, with a CPR component. The expectation that the provider obtains any additional training required to provide respite services in a safe and professional manner for the individual, (e.g. personal care, health care, behavioural supports) should also be noted.  Completion of a health and safety review of the respite provider’s home when the individual spends time in their residence as part of the respite service.  Duty to inform the home share provider if they or any person participating in the delivery of respite services is charged with a criminal offence. |
| **Policies** | Define the responsibility of the respite provider to review and comply with any written guidelines provided to them in relation to the provision of respite services. |
| **Reports and/or**  **Documentation** | Responsibility to complete any required written reports or documentation associated with the respite role. This could include incident reports, medication administration documentation, etc. |
| **Sub-contracting** | Responsibility not to sub-contract duties. |
| **Liability** | Acknowledgement of responsibility to provide the respite services in a safe and professional manner and in accordance with applicable laws and policies described, including obtaining any property or health and safety insurance coverage, as they deem necessary to protect themselves and their belongings while providing the respite services. |
| **Confidentiality and Privacy** | Responsibility to the maintain confidentiality of sensitive personal and confidential information about the individual and their family and acknowledgement to protect this information from disclosure and respect the privacy rights of the individual. This can include the expectation that the respite provider completes the CLBC Privacy and Information Management online training. Penalties, for a breach of these responsibilities, should be defined. |
| **Termination or Amendment** | Terms associated with termination, continuation, or amendments of the agreement, e.g., 30 days’ notice including the stipulation that if/when they are no longer providing respite services for the individual, that all documentation must be returned to the home share provider. |

It is important that, even though the home share provider is responsible for both recruiting and monitoring the performance of their respite supports, that you are clear that your monitoring duties will include discussions confirming their attention to the important details. Remind them that your monitoring will include, at least annually, a review of the documentation that is kept by the home share provider to make sure it meets expectations, is complete, and current. Our agency’s documentation on the individual should also include up to date information on who is providing respite in the event that we need to contact them if the home share provider is away.

### A. When the Family Provides Respite

Some individuals have family members who are happy, able, and appropriate to provide respite. Often the time family members spend with their loved ones has the outcome of providing respite for the home share provider. It is very rare that this involves compensation.

If, in these rare instances, compensation is negotiated, the arrangement is still coordinated by the home share provider and the written agreement and other documentation requirements should be in place. Payment, in these circumstance, would remain the responsibility of the home share provider. The family member would need to be advised of reporting responsibilities associated with incidents in order to maintain a complete and accurate record and also need to take care of any medication administration associated with supporting the individual. These aspects of the respite support can be managed by the home share provider.

### B. When the Provider Isn’t Using Respite

It is important that your monitoring role also examine if the home share provider is not using their respite funding. Sometimes providers bank the money as an additional financial incentive unaware of the costs to their well-being and the potential issues with quality of care that can emerge when they are tired and haven’t had a break. Some may not be receiving respite funding and feel they cannot afford the costs of paying for respite.

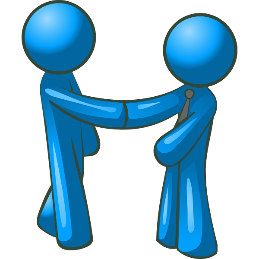
Respite funding is a vital part of what sustains a home share placement. Explore with the home share provider about the reasons they aren’t using respite – are they having difficulties recruiting someone? Are they saving up the time and money for a longer absence? Or is the concern about their contract compensation and using the respite funds to augment their income? These are issues that should be discussed with them as part of our monitoring process. We need to be vigilant about the impact that can occur and incorporate this issue into our monitoring visits.

## 4. Fostering Individual Rights and Responsibilities

Upholding the self-determination of the individual being served in the home share setting is another critical aspect of supporting the living arrangement. When people understand their rights, and feel able to defend them, another safeguard has been added that helps to negotiate the shared space and shared responsibilities. Individuals must receive a copy of our Handbook when they are welcomed to the home share service. The Handbook provides a plain language presentation of their rights and should be referenced on a regular basis, both as part of annual planning processes and whenever you feel that the conversational topics are relevant. The individual should be supported to receive the information about their rights in a format that confirms their understanding of the ideas as much as possible. That may mean you read the documents with them, show a video, and/or use other resources we have developed to assist with their comprehension. It is also important that the home share provider is aware of the rights information, their responsibility to uphold them, and able to talk with the individual about what they mean in practical terms in the day to day life of the household and their relationship.

## 5. Addressing Complaints and Concerns

Our organization has a comprehensive complaint resolution process which is available to home share providers, individuals, and families to use to address their concerns. We post this information on our website, in written materials, and review it as part of intake and orientation for everyone involved and include it in the Terms and Conditions of our contractual agreements with the provider. Everyone should understand that it is available for their use without fear of retaliation. Additional advocacy supports that can be accessed, should they be required, are also part of the information provided.

It is important to note that many concerns can and should be addressed between the parties involved, and without the need to submit a formal complaint. Playing a mediation role is not our first choice, as it obstructs the participants taking responsibility for working out their issues in a constructive, ongoing manner.

Use your monitoring visits to be curious about any potential issues which might be emerging in the conversations you have with providers and individuals. Explore with them what solutions they think would assist in finding a resolution. Think about ways you can coach either party in how to address the issue and ensure you document the information in your contact notes for follow up later.

On occasion, it may be appropriate to provide a supportive and mediating role in the management of a complaint or concern. As noted earlier, if you have not played this role before, ensure you reach out to [designated leader] for support. Again, as with any issue relating to the support you provide to the home share relationship, ensure you document the discussion, the agreements reached, and the next steps. This documentation should be shared with the individual, their personal support network (as appropriate), and the home share provider.

# Chapter 5 B: Your Role in Monitoring the Shared Living Arrangement

## 1. The Role of Monitoring as a Safeguard for Individuals and Home Share Providers

### A. What are Safeguards?

Safeguards are **intentional actions** designed to help reduce a person’s vulnerabilities and to help protect good things in their lives. Vulnerability is not unique nor limited to people with developmental disabilities; each of us lives with some level of vulnerability which may be enlarged at different times in our lives. A change in our health, our living situation, our finances, or family dynamics can make us more vulnerable either permanently or temporarily. However, a variety of circumstances many people experience when they have a disability increase their potential vulnerability beyond what occurs for others.

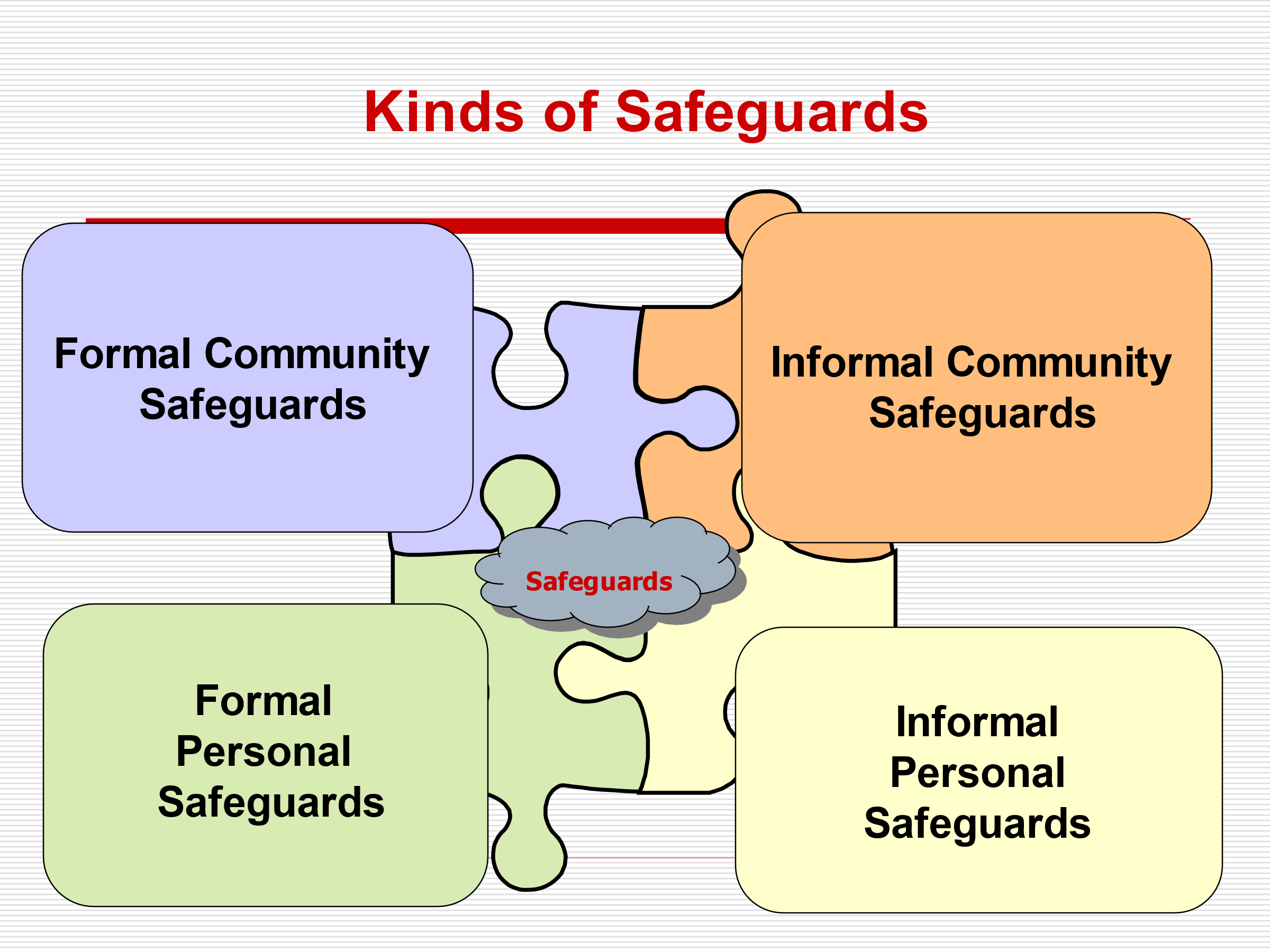
People who have a developmental disability can be more vulnerable because they often experience these types of situations:

* They do not have opportunities to take part in community activities
* They do not have a job or enough money
* They do not have friends or supportive family in their life
* They do not belong to clubs or groups where they develop alliances with others
* They do not know or understand or know how to exercise their rights
* They experience health professionals who make assumption that a symptom of concern that they have is related to their disability and don’t take extra measures to rule out other causes (often called diagnostic overshadowing)
* They have difficulty communicating their needs and preferences
* They are labelled e.g., having ‘challenging behaviours’
* They are not listened to or don’t have opportunities to use their voice
* They are not taken seriously or believed
* They are considered an eternal child and not afforded adult roles and responsibilities where they are valued and recognized for their contribution
* They experience discrimination at work or school (and no one challenges those discriminatory behaviours)
* They experience negative attitudes & disrespect from people

*Adapted from Responding to Vulnerability: A Discussion Paper about Safeguards and People with Developmental Disabilities.  CLBC, April 2007.*

### B. Kinds of Safeguards

There are different kinds of safeguards. The different kinds fit together like a puzzle – to provide overlapping safeguarding in response to different vulnerabilities a person may experience. Safeguards provide mutual benefits to both the individual and home share provider whom they live with.



Adapted from *Responding to Vulnerability: A Discussion Paper about Safeguards and People with Developmental Disabilities.  CLBC, April 2007*

#### What are Formal **Community** Safeguards?

Formal community safeguards often exist in the form of laws, regulations, or policy and standards. Our agency has a formal role in providing safeguards for the individuals we support through our monitoring role and processes. Some other examples include the role of the RCMP, CLBC, or the Public Guardian and Trustee.

#### What are Informal **Community** Safeguards?

Informal community safeguards are typically created by concerned or ordinary citizens and rely on people’s sense of responsibility to and for one another. Examples of this type of safeguard include Neighbourhood Watch, neighbours checking on each other’s houses, ride sharing among members of a faith community, etc.

#### What are Formal **Personal** Safeguards?

Formal personal safeguards may also be attached to regulatory bodies or contractual responsibilities and often take the form of a contract, protocol, or individualized plan which is tailored to address a person’s unique circumstances and vulnerabilities. Examples of this type of safeguard include behavioural support plans, health care plans, individualized bathing guidelines, dysphagia management plans, and personal care protocols, etc.

#### What are Informal **Personal** Safeguards?

Informal personal safeguards are typically those derived from having a rich, personal support network and are based on trust and caring personal relationships which can provide creative solutions to unique individual needs. Examples of this type of safeguard are highlighted when individuals we support have full lives in community and the opportunity for the types of connection that stimulate real relationships e.g., colleagues at work or school, other parishioners at a faith community, being a regular at a local coffee shop or fitness class. A reliance on only people who are paid to be in your life reduces the social safety net around an individual.

Overlap and redundancy are important with safeguards – if one safeguard does not work for some reason, there is another than might work. In your role, understanding and applying safeguards is an important aspect of your interactions with home share providers, individuals, and their friends and family members.

You can read more about safeguards, and strategies for incorporating them into your planning and supports with individuals in home share settings, by reviewing the resources created by CLBC which can be found on their website at this link:

<https://www.communitylivingbc.ca/resources/safeguards-resources/safeguards-resources-documents/>

These should be shared with your home share providers as additional resources for their reference and application to their role.

## 2.The Purpose and Benefits of Monitoring as a Safeguard

As discussed earlier in this manual, it should be clear that setting the stage for a successful shared living situation requires a lot of front-end work to understand the motivations of the prospective home share provider, the needs and wishes of the individual, and their personal support network, and then taking the time to do your due diligence on behalf of everyone involved. Ensuring that these responsibilities are fully met in the development of a home share situation, helps to cultivate success over the long term while nurturing a fulfilling experience for everyone.



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Your role in monitoring the home share provider should be made clear from the very first introductory conversations that are held with everyone. That helps ensure there is clear and consistent understanding about the ways and means by which you will be maintaining an ongoing role with them.

**It is important to emphasize that your monitoring role is a necessary, formal safeguard for everyone involved in the relationship.**

### A. For the Individual

Monitoring helps to safeguard the quality of life of the individuals we support, including their health, safety, and wellbeing. Our regular engagement with both the person served and the home share provider, is the means by which we help ensure this outcome.

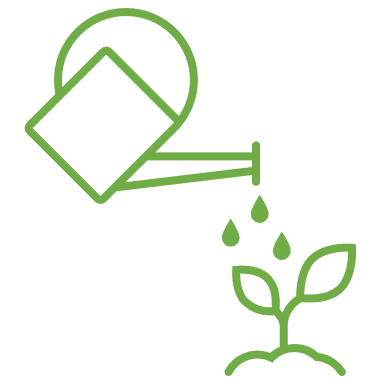
The home share arrangement can experience stress when changes occur in the life of the individual and/or their provider. Regular monitoring can attend to these changes and intervene before the relationship is at risk.

Even if the individual has family and friends in their life, our monitoring relationship provides them with private, independent opportunities to express what is working, talk about how they feel about their living situation, and their satisfaction with their choices. Our connection with the individual should provide confidence that we are genuinely interested in their thoughts and experience **and** that we are a resource for them to call on.

### B. For Family and Friends of the Individual

Families and friends of the individual have entrusted our agency with the responsibility of safeguarding the safety and security of their family member. Some families may not live in the same community as their family member. Our monitoring ensures that there is an additional set of eyes and ears.

### C. For the Home Share Provider

Our monitoring role can reduce the potential for isolation in the provider role and provide assistance with navigating the day to day supports and relationship with the individual they are serving. This is true regardless of the depth of experience of the home share provider – our expertise helps to reinforce strong practices and problem solve situations where coaching is needed.

The support we provide reduces the risk to the home share provider. Proactively offering our support, and providing coaching and mentoring, or facilitating access to other professional expertise as needed, helps to look after the wellbeing of both the individual and the provider.

### D. For Our Organization

Our funders contract with us to coordinate the delivery of home share services and in turn, we contract with providers who are paid for their services. Monitoring the home share provider’s accountability to us is part of the agreement to fulfill these terms and conditions.

As an agency, we pride ourselves in the delivery of person centred services that enhance the quality of life of the individuals we serve. Our monitoring role, in ensuring that the home share setting is meeting our expectations, is directly tied to our credibility and reputation as an agency in meeting this responsibility.

## 3. Monitoring Schedules and Frequency

There are several factors in considering the schedule by which we monitor the home share relationship.

A. The beginning of the home share relationship. The earliest days of the home share relationship will require more frequent check-ins to confirm that the new household arrangement is proceeding well. While our responsibilities as a [CARF/COA] accredited agency require that we ensure we confirm that we have conducted a monitoring visit [frequency of either CARF/COA’s standard], our organization commits to at least weekly check-ins in the first month. These should be a combination of phone calls and in-person visits which provide you with the opportunity to see firsthand how everyone is doing. These should be arranged at a time that is convenient for both the individual and the home share provider when they will both be home. If there are specific types of personal care needs, medication administration, or behavioural supports involved, probe these areas as well to confirm the comfort and confidence of the home share provider in meeting the responsibilities. All your contacts must be documented on [tracking form/case management system you use to record information] with details of your observations about the interactions between the individual and provider, successes and challenges that are identified, and any requests for resources or supports that have been made. It is critical that you follow up on any requests as quickly as possible. Documentation of your monitoring and follow up is essential.

In addition, it also important to arrange a private time to meet with the individual to explore their experience and feelings separately from the home share provider. Depending upon on their schedule and preference, this could be a coffee or lunch visit or a walk together in the community. You are working to build a relationship of trust with the individual and their home share provider where everyone feels safe to tell you how they are doing. Make sure to document these connections as well.

If the individual has family and friends involved in their life, it is also important to check in with them for their early impressions of how the new relationship is going. All of the sources of feedback contribute to your developing understanding of the dimensions of the relationship and areas you wish to flag as potential needs or opportunities.

B. On an ongoing basis. We conduct in-home monitoring visits at least quarterly with the home share provider and individual. Timing for these visits should accommodate the schedule of the household and the person served.

These conversations, like other interactions with the home share provider and the individual are a chance to provide your reflections and positive feedback to everyone. They offer a chance to celebrate what’s going well in the relationship, encourage feedback, and endorse their successes.

These visits should be documented on [the monitoring forms/case management system you use to record information]. The topics included also confirm that the required documentation is completed and submitted by the home share provider.

This documentation includes:

* critical incident reports
* internal, non-critical incident reports
* health care updates including reports from doctor’s/dentists and other community professionals
* quality of life reports and updates on progress towards person centred plans and goals [according to our schedule]

If there are concerns or issues identified, it is important that you follow up with the home share provider to ensure they understand their responsibility to remediate the issue. This should be done in writing with an expected date for confirmation of completion to support effective monitoring, documentation requirements, and confirmation of remediation.

Each visit must include time to visit with the individual independently. This practice is important to hold space for issues that they may not feel comfortable bringing up in front of the home share provider.

C. On an annual basis with the home share provider. In addition to the quarterly visits, we review documentation on an annual basis to ensure that the home share provider is meeting the contractual expectations. This is a wonderful opportunity to applaud the successes and strengths of their relationship. Ensure you schedule enough time to not feel rushed in the process. This may require more than one meeting depending upon the schedule of the home share provider. Make a practice of summarizing the conversation at the end of the meeting as a wrap up, thanking them for their time, their candor, and their service to the individual.

The schedule of documentation review and/or renewal is conducted and documented on our [name of tracking form/ case management system you use to manage the information on the home share provider and includes these items. A copy of the annual review, noting any follow up required, is given to the home share provider for their records and to assist in their remediation process.

**ANNUAL REVIEW OF HOME SHARE PROVIDER**

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirements** | **Follow Up Required** | | **Notes & Follow Up Required (include expected date of remediation)** |
| 🞎 CRCs current for all adults living in the home | 🞎 Yes | 🞎 No |  |
| 🞎 First Aid/CPR certification: next due:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 🞎 Yes | 🞎 No |  |
| 🞎 NVCI/MANDT: next due: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 🞎 Yes | 🞎 No |  |
| 🞎 Driver’s Abstract | 🞎 Yes | 🞎 No |  |
| 🞎 Car Insurance | 🞎 Yes | 🞎 No |  |
| 🞎 Provider’s Home Insurance | 🞎 Yes | 🞎 No |  |
| 🞎 WorkSafe BC: Account # confirmation | 🞎 Yes | 🞎 No |  |
| 🞎 List of all persons living in the home | 🞎 Yes | 🞎 No |  |
| 🞎 Emergency Contact Information | 🞎 Yes | 🞎 No |  |
| 🞎 Respite Provider Information current | 🞎 Yes | 🞎 No |  |
| 🞎 Declaration of Confidentiality renewed | 🞎 Yes | 🞎 No |  |
| 🞎 Code of Ethical Conduct renewed | 🞎 Yes | 🞎 No |  |
| 🞎 Person Served Home Binder Up to Date | 🞎 Yes | 🞎 No |  |
| 🞎 Health & Safety Checklist completed | 🞎 Yes | 🞎 No |  |
| 🞎 Behavioural Support Plan Reviewed |  |  |  |
| 🞎 Safety Plan Reviewed | 🞎 Yes | 🞎 No |  |
| 🞎 Protocols Reviewed (e.g. bathing, personal care) | 🞎 Yes | 🞎 No |  |
| 🞎 Training Reviewed/Renewed (medication administration, documentation, incident reporting, values, etc.) | 🞎 Yes | 🞎 No |  |

D. Annual Review with Individuals. A variety of activities are scheduled as components of our monitoring specific to the individual and safeguarding their quality of life. On at least an annual basis, we also review and update the person’s:

* Care Plans (if applicable)
* Person Centred Plan, including individualized goals
* Requirement for financial oversight and the methods used to support the individual
* Medications and support required
* Review of Rights, including familiarity with Complaint Processes
* Behavioural Support and Safety plans
* Legal Status

These areas of our monitoring of the individual’s planning and supports, typically form part of a facilitated meeting where those who the person wishes to have participate, gather to talk with them and update goals. The individual always has the right to refuse to participate in setting goals. If they do agree, the planning meeting provides an opportunity to review these topics.

The individual may wish to facilitate the meeting in partnership with the home share provider or may ask you to be the host. Working out who will build and agenda and make sure all the topics are included helps make sure the conversation goes well and includes everyone’s voices and ideas. It is a good idea to contact the individual ahead of time to refresh their understanding of these purpose of the meeting and how it will proceed.

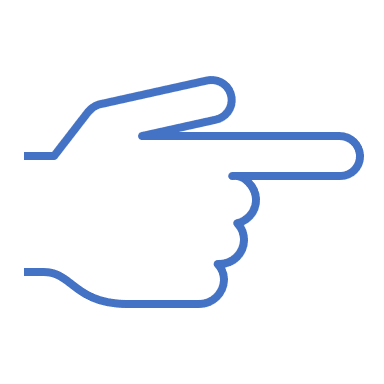
Ask them where they feel most comfortable holding the conversation and who they want to have involved. Schedule the meeting for a time that will work in their day and maximize their participation.

Ensure that all the documentation developed from this annual review is complete and stored in the individual’s record. These plans are important references for you in your ongoing monitoring relationship with the home share provider and your oversight of the support provided to the individual.

E. In response to changing needs. Health care plans, behavioural support and/or safety plans, and other individualized aspects of the support to the person served, may shift rapidly, and require review and revision outside of the annual meeting and/or our monitoring visits. For people with complex needs, chronic health conditions, or medication adjustments, the planning may be ongoing. It is vital that allied professionals who are part of the support to the individual are engaged in the updating of plans. In these instances, your role is to support the home share provider to receive all the necessary information and any training required. You are also responsible for confirming that all the documentation regarding the plans and supports is kept current and distributed as appropriate. Some home share providers may feel comfortable playing a liaison role with community professionals; others may ask for your support in meetings and in coordinating extra resources. Ensure you have confirmed the level of liaison you are expected to play with each individual and their home share provider and plan your schedule of contact with them accordingly.

## 4. Best Practice Approaches to Monitoring

### A. Act as a Coach and Mentor:



**Helpful Tips**

Your vetting process to onboard the home share provider will have given you a chance to review the areas where they are strong and areas where they may need support. Many of the home share providers may be new to the world of services and supports to people with intellectual disabilities, and will benefit from your mentorship to learn about how the “systems” work, the referral process, accessing community professionals, etc.

If you have been successful in building a solid, working relationship with the home share provider, they will feel comfortable asking for your advice, suggestions, or direction in situations involving the individual.

Use a reflective style in your interactions with them. This involves asking open ended questions which invite their ideas and help build their confidence in a collaborative working partnership with our agency and your role. Utilize questions which invite their input, such as:

* *What kinds of concerns are you having about the individual’s health?*
* *What are you finding tricky about the interactions you are having the person’s family?*
* *What are your observations about their confidence in these types of situations?*
* *What worked well in managing that situation? If you were to experience the same situation again, what would you do differently?*
* *What strategies are you thinking about to address the situation?*
* *Where do you think I can be helpful?*

As discussed in Chapter 4B-2D, an area that may require your coaching is in the documentation required of home share providers. Creating reports may be very new to the provider and they may need support to successfully complete their responsibilities in this area. Provide our reporting templates and spend time with the home share provider to support their understanding of the content required. Make sure your coaching includes providing feedback to support their development and understanding.

### B. Document, document, document!

Documentation is a vital part of your monitoring role. Ensuring you maintain complete, accurate, and objective documentation is essential for many reasons.

* It helps “hold the story” of your interactions with the individual, their family and/or personal support network, and the home share provider. Providing summaries of important conversations and planning meetings helps remind everyone of their part and ongoing responsibilities.
* Strong documentation demonstrates our due diligence, forming part of the legal record of our oversight, responding to our contractual accountabilities, and confirming our regular engagement in our monitoring role.

It is important to schedule time as soon as possible after a meeting or contact with a home share provider or individual to complete your documentation so that it is fresh and accurate. Although some interactions with home share providers and individuals may allow you to take notes while you are meeting with them, this can often feel intimidating and may inhibit the flow of the conversation. If you feel you need to take notes, ensure that you signal that intention at the start of the meeting and let the person know that it is to help you remember the important things that are being said.

See more information about tracking and documentation in Chapter 8.1.A

### C. Foster a Strength Based Approach

The relationship between the individual and the home share provider will benefit from an approach that capitalizes on their strengths and creative solutions to solving issues that come up.

While there are some aspects of the support that an individual requires that are non-negotiable and must be maintained in a consistent way (e.g., medication administration, dysphagia diets, or certain behavioural interventions), encouraging creative brainstorming can be fun and open up possibilities for new ways of learning things or managing situations.

Your role is to help people remember what has worked well in the past and can be applied to new situations in addition to identifying new resources or ideas that can be useful in the home share setting.

## Chapter 5 – Q & A Supporting and Monitoring the Home Share

What if the home share provider is used to less frequent monitoring than we expect?

What if the home share provider consistently speaks for the individual when we are meeting together?

**Clarify expectations early.** Some home share providers have transitioned from other Ministries or were directly contracted with CLBC. Their experience of monitoring will be different than the expectations we hold. Part of the onboarding of a home share provider who is being migrated from another monitoring or contractual relationship will involve not only completing a fulsome confirmation of their suitability according to our processes, but also apprising them of our monitoring and documentation requirements. A consistent message helps reinforce our expectations.

**Empathize with the transition they are experiencing.** The transition to a new organization with different practices may take some adjustment for some home share providers. Others will enjoy the extra attention and support they are receiving. Let them know you understand that the change is something they have to get used to.

**Offer support to ensure success.** Our reporting requirements may be new to the provider. The frequency of our monitoring may feel intrusive to them. Emphasize the safeguard that our role provides to both they and the person they serve and offer resources and supports as needed to ensure their success.

**Model the behaviour you wish to see:** The home share provider may be unaware of their behaviour and assume that they have permission to represent the views of both the individual and themselves because of their contractual role. Thank the home share provider for their input and then deliberately and consistently ask the individual what their thoughts are as a way of demonstrating your expectation that their opinions are also a priority.

**Support the individual to participate:** Many factors can impact on how the individual contributes to the conversation. They may be shy and reticent to speak. Perhaps they use eye movements, gestures, or other sounds to indicate their preferences and opinions. Dig deep and learn about the ways in which you can increase the comfort of the person, welcome their input, and the strategies that you can use to encourage their participation. This might mean they have a friend or family member to support them if that encourages their voice.

**Ensure you have private time with the person served – this is a requirement of your role:** It is vital that you build a relationship with the individual receiving home share support that cultivates their trust and confidence in providing honest feedback to you about their living situation. It can be difficult for the person to feel safe expressing any concerns or criticism in front of the home share provider. Regularly spend time talking over coffee, a walk in the community, or an activity that the person enjoys as part of your monitoring.

**Look for opportunities to emphasize rights and self-determination:** These values are core to our organization’s service to people. They are also part of the Quality of Life domains and should be considered in the personalized planning process. Reinforcing the importance of these areas of life and looking for ways in which you will be monitoring how these domains will be attended to, provides another reinforcement for the home share provider.

What happens if the home share provider wants to rush through the process and conversation we need to have during the scheduled monitoring visit?

**Preparation is important:** Provide a clear expectations when you book the appointment**.** Ensure that you indicate what will be discussed and the amount of time it will take to conduct the monitoring you are required to do when you schedule the appointment. Ask the home share provider to protect that time and limit other distractions as much as possible. If it has been a while since you saw them, make sure you check in a day or two before, via email or phone call, to remind them of the meeting and scheduled time.

**Determine what the issue is:** Even if you have prepared the home share provider with clear expectations about the monitoring visit, things can change in their schedule. It is important to check in with them about the apparent rush they are in and determine if some of your conversation should be shifted to another meeting. They may be reluctant to be frank with you if they are worried about ramifications of shifting the meeting.

**Consult with Other Team Members**: They have likely experienced this circumstance and have ideas that you can use to engage the provider and have a successful visit.

**If this Becomes a Pattern:** Talk to your other team members or your designated leader about what you can do to address this issue. It is important that you are able to provide the monitoring required to meet our contractual responsibilities and safeguard the individual’s health and wellbeing.

What if the home share has copied and pasted much of the previous Quality of Life report because they believe nothing much changes month to month?

**Clarify the issues that are getting in the way of writing the report.** Many home share providers deliver excellent supports to the individuals who live with them but have very little experience with documentation. This can impact on their confidence in meeting the reporting responsibility.

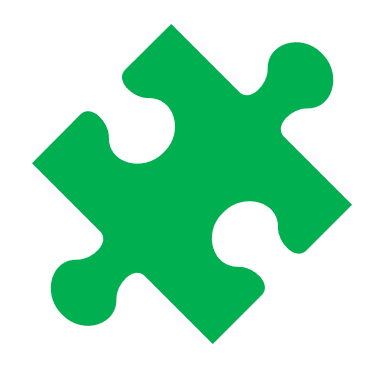
Language or literacy could be a barrier, as can confusion about what kind of information is requested and required. Providing samples of the types of the information you need can be a helpful reference for the provider and assist with building their confidence.

**Act as a coach.** Quality of Life domains can feel vague for some providers. Go back to the person’s individualized plan and refer to the goals and the domains they are linked to. Explore ways in which the individual is experiencing success in achieving their goals or barriers that are emerging and how this can be described. Offer to work with the provider to produce a section of the report to test their understanding and provide hands on support. You may want to check out the tips in Section 3B-2D.

**Seize the opportunity to reinforce our values and person centred philosophy.** We believe that everyone grows, changes, and learns everyday. This may not be as easily understood when the changes a person presents are subtle. Help the home share provider appreciate both the small and large ways the individual is expressing their interests in the world, their relationships with others, and their contributions.

**Remind them of their contractual responsibilities to our agency and to the individual.** The need to provide documentation will have been clearly defined in your onboarding process. Regular monitoring visits should also reinforce this obligation. Moreover, emphasize that the successes and challenges the individual experiencescan only be well understood, celebrated, and resolved with candid information provided.

**Navigating the Complexities of Home Share**



**Navigating the Complexities of Home Share**

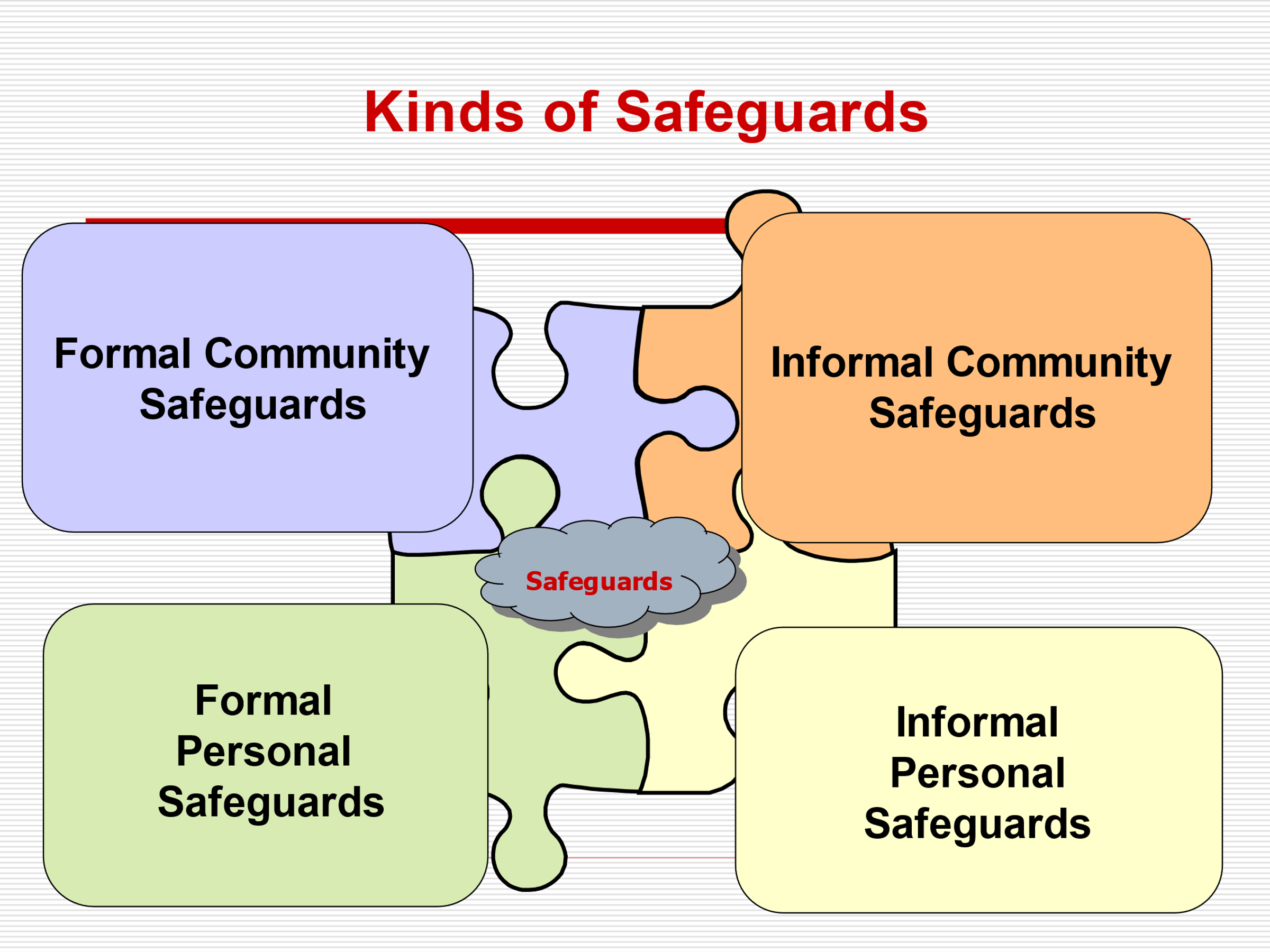
**Chapter 6**

# Chapter 6: Navigating the Complexities of Home Share

## 1. Building Safeguards to Address Risks and Vulnerabilities in the Individual’s Life

“Vulnerability is not normally a “stand alone” state that is inherent in a person but is rather the result of the circumstances of one’s life and their effect on either shielding a person from harm and hurt or accentuating these very same factors.”

Kendrick, M.J. (2012),”Vulnerability in Adult Home Sharing Situations for Persons with Disabilities” *International Journal of Disability, Community & Rehabilitation, Vol. 11 #1*.

Chapter 5 includes an overview of what safeguards are and how they can help manage vulnerabilities which may arise in the lives of the people we support. Our organization applies safeguards in our person centred planning and management of vulnerabilities and risks. A safeguards lens is valuable in the ongoing assessment of risks and in using both formal and informal safeguards to help manage those risks. The creation of strong, personal support networks is integral to reducing personal vulnerabilities both for those we serve and the home share providers we support.

Adapted from *Responding to Vulnerability: A Discussion Paper about Safeguards and People with Developmental Disabilities.  CLBC, April 2007*

### A. Recognizing the Power of a Circle of Support as a Safeguard.

Personal support networks are not only applicable to people with developmental disabilities. They provide an informal safeguard for each of us. Having people in your life that care about you, is one of the most important ways to feel safe and valued. Having friends to talk to and opportunities to engage in your community, not only adds to your quality of life but also helps provide a protective and supportive safeguard for us when we feel vulnerable and reduces the risk of bad things happening to us.

A strong personal support network is particularly important for people with developmental disabilities. Many individuals, especially those who have lots of paid services in their lives, have very small networks of these informal supporters. Personal support networks can be a rich source of creative ideas, links to community resources, and provide an individualized ‘safety net’ for the person. Quality of life includes having a rich contribution to your community – this requires an intentional focus to ensure actions promote the development and maintenance of a personal support network.

This focus is part of your coaching and mentoring role as a [Coordinator/Manager]. This requires helping the home share provider, in partnership with the individual they support, to look for opportunities to build community connections. It will involve weaving strategic and focused activities into the individual’s plan that will nurture their personal support network. Doing so may mean the home share provider has to unlearn or rethink their role to some degree. They will benefit from your support in doing so.

See Chapter 8 1.E on Community Mapping for further ideas, in conjunction with reviewing the CLBC resources on safeguards and personal support networks.

### B. Integrating Safeguard Planning into Your Support

At intake: As part of intake, you will have completed a vulnerability and safeguards assessment which includes the input of the individual and their support network, as appropriate. This document is not a “one and done” exercise. It is meant to be regularly reviewed in response to areas in the person’s life that require attention and to facilitate the development of safeguards to ensure their quality of life and their safety and wellbeing. [Add details of the vulnerability assessment form or other type form you use that explores the areas where the individual may require specific attention to the development of safeguards to reduce their vulnerability in key areas of their life. etc. ]. The foundational information you gather at intake, provides a helpful starting point to assist in your monitoring and planning with the individual and their home share provider.

Annual Review: A documented review of existing vulnerabilities and safeguards should occur at least annually as part of the updating of the person’s individualized goals during the person centred planning process. All of the documentation helps to hold the story of our services and supports, and the successes and challenges which have occurred over the course of the year. The planning process is an inclusive one welcoming the people who know and care about the individual, with their agreement, to help celebrate and dream together. Goals represent opportunities for the individual and with planning, there may be vulnerabilities related to some of the goals and activities that are included in the plan. As you consider the Quality of Life domains and goals the person has, think intentionally about the safeguards that will help achieve and sustain their goals and encourage success. Each plan is unique to the person – each safeguard will reflect their unique circumstances and the specific conditions that make them more or less vulnerable.

The Review Process. Just like the process at intake, it is important that this vulnerability and safeguards assessment be completed with others who are part of the individual’s team/life in order to make sure all the pieces of information that people hold are included. The review and renewal provide an opportunity to consider the safeguards, including natural supports, that are working well for the individual, and where they should be augmented. It also acts as a trigger for considering whether to increase the frequency of your monitoring interactions.

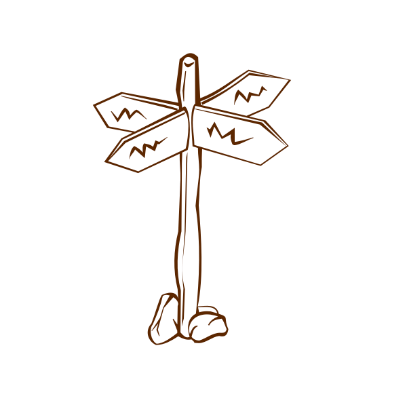
The review should include the input of your home share team peers who can offer insights, ideas, and potentially history from other interactions with the individual and/or their home share provider. The completion of a vulnerability and safeguards review should form part of your regular, collaborative team meetings where peer support and input helps to inform the assessment and expand the capacity for other members of our home share team to pitch hit as needed. This could be taking an afterhours call, covering for a vacation, or when caseloads need to be reassessed and shifted.

The review and updating of the assessment should be thoroughly documented in the individual’s record, including the decisions that are made about the frequency and types of safeguards that will be implemented. The documentation should be clear about when you will be reassessing the effectiveness of the safeguards and who is responsible for the action items associated with their implementation.

### C. Managing Emergent and Ongoing Risks and Developing Safeguards.



Safeguards as a response to changes in the person’s life. A full life, lived in community will mean that people’s lives change as they have experiences and explore their interests and goals. Part of your ongoing monitoring role includes assessing the viability and effectiveness of the safeguards which have been identified and put in place for the individual. It is important that this vulnerability and safeguards assessment be reviewed and renewed in response to changes in the person’s life, including the impact of changes in the life of the home share provider.



Where is this going?

#### An Example of a Safeguard Approach

*The home share provider and her husband have provided a stable home for a young man with complex support needs. Although the young man has bonded with both of them, the husband has been a strong, male role model and helped maintain the living situation. After a short, aggressive bout of cancer, the husband passed away and although the home share provider is sure she can continue, you are concerned about not only her grief and loss, but also about the lack of a male influence in the household. You are concerned that problematic behaviours will re-emerge. The review of Vulnerability and Safeguards assessment is completed and other males in the young man’s life are identified who can increase their involvement. In addition, his male supervisor at work whom he likes and trusts, is enlisted to support him. The home share provider’s daughter is moving home for a period of time as well to support her mother and has a healthy connection with the young man. The frequency of your monitoring is increased to monthly for the next 3 months to assess how everyone is doing with the dramatic changes in the home.*

Changes that require a review of safeguards. While this is not a complete list, other events which should trigger a review of the individual’s vulnerability assessment and consideration of safeguards, include things like:

1. Changes in their health:

* Has the individual received a recent diagnosis requiring additional health interventions? Will training be needed to safeguard the person?
* Have they developed dietary restrictions that should be monitored? Will there need to be changes in the way foods are prepared e.g., pureed, gluten free? Is the support of a dietician needed and available?
* Are they now using a feeding tube? What will the training protocols be? How will your monitoring factor in this new route for their nutrition?
* Have they had a recent hospitalization and now require physiotherapy or other rehabilitative supports? Will they need mobility aids or orthopedic shoes?
* Has their family doctor retired? Are they now without a regular physician to monitor their health? How will this safeguard be handled?
* Are there concerns about changes in their cognition? Are they forgetting things that are familiar and part of their daily routine? What are the ways in which your monitoring will respond? What safeguards will be put in place?

1. Changes in their community activities and/or employment:

* Are they starting a new job and will need to learn a different bus route to arrive safely and on time at work? What safeguards will be put in place to manage this and build their confidence and success with travelling to work?
* Have they started a new volunteer position? Will they require learning some safety measures to be successful? What are the safeguards at the location?
* Has their favorite coffee shop changed owners? What are the strategies to introduce them to the new people and rebuild this informal safeguard?

1. Changes in their circle of support:

* Have there been changes in their family and/or personal support network? Has a parent passed away or moved to another community? Has a roommate moved? What safeguards have you considered to support them with their feelings about these changes?
* Is the home share provider under stress due to changes in their relationship, health, or employment? What are the specific monitoring concerns you will address and what safeguards are needed?

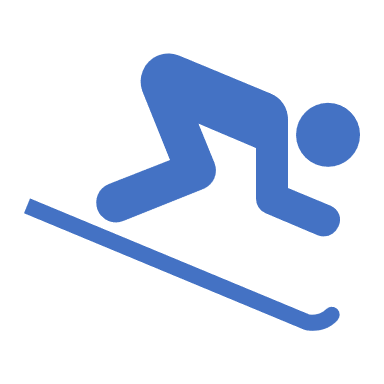
1. Social Connections:

* Has the individual recently become involved in a new relationship? Will they need support to manage their sexual health and understand consent? What safeguards will be considered and implemented?
* Have they recently retired from their work and are now spending a lot of time alone? How would safeguards support them and reduce their potential isolation?
* Does the person have social contacts which put them at risk? E.g., illegal drug use, financial exploitation. What safeguards are appropriate?
* Is the individual active on social media, including internet gaming? How will you safeguard their virtual life?

## 2. Handling the Complexities of Risks

A. Respecting the Dignity of Risk. The Dignity of Risk refers to the legal right of every person, including people with a developmental disability, to make choices and take risks in order to learn, grow, and expand their life experiences and opportunities. The ability to exercise choice, and voice, is often impeded in the world of paid services and supports out of a fear of harm occurring to the individual. We may worry that they will be exploited or victimized if non-paid individuals are part of their lives.

Our concern about their vulnerability can mean that people’s lives are highly controlled, are highly restricted in terms of choices, and decisions are made for them rather than with them. To be clear, supporting the rights of individuals to experience the dignity of risk, does not mean we forfeit our responsibility to consider their safety and wellbeing. Rather, using a safeguards lens helps to:



Risk

Reward

* Identify risks,
* Consider the person’s intended outcomes,
* Decide if its worth it to take that risk, and,
* Plan strategies to reduce the potential for a negative outcome.

Considerations of risk, just like considerations of safeguards, are individual and must reflect a thoughtful analysis of the person’s circumstances and areas of vulnerability. Some examples of risks that might be worth taking for one person, and not for another, include:

* Navigating a new bus route to start a new job.
* Risking the possibility of being turned down by asking someone out on a date.
* Moving into your own apartment.
* Having a debit card to manage your purchases.

Managing risks, and promoting choice, is fundamental to our value of individual self-determination. As you consider risks, think very specifically about the personal safeguards that might be necessary for the individual. Talk with them, the home share provider, and their personal support network, about strategies that have helped in the past, how the safeguard will be implemented, and how it will be assessed. Prioritize the list of risks. Give top priority to those likely to cause the greatest or immediate harm in relation to the goals that are the most important to the person.

### 

### B. Managing the Fears for Family Members and Providers

Some families and home share providers may find it very difficult to support adults they care about to make decisions that they feel place them at risk. It will take time, careful listening, and empathy for their concerns to gain their agreement. Ironically, without an emphasis on ability and self-determination, it is far easier for people with developmental disabilities, who have historically experienced very little power or control over their lives, to be exploited or dominated by well-intentioned others.

It is vital that the focus in conversations about safeguards and risk, acknowledge these fears and also support the capacity and right for individuals with developmental disabilities to exercise their self-determination. The more the focus is on an interconnected and complimentary application of appropriate safeguards, the stronger their supportive benefit will be.

#### Example of Supporting a Goal by Building Safeguards

Jane enjoys having dinner with friends at her local restaurants. In the past, she has always had a ride from her home share provider to and from the location. She wants more independence and to be able to walk to and from the location on her own.

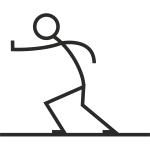
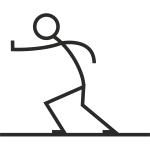
The home share provider and Coordinator arranged for Jane to get a cell phone which was programmed with numbers for key contacts so it would be easy for her to use. Together they practiced walking the best route to a favourite restaurant, managing the street safety considerations, and how to use the phone. They created a plan that when Jane arrived, she would call the home share provider to let her know she had arrived. Similarly, when she was ready to walk home, she called and let the provider know she was on her way. This intentional, personal safeguard has enabled Jane to reach her goal of more independence in her time with friends, enjoying meals out in the community.

C. Staying the Course When the Individual’s Lifestyle Choices Feel Very Risky. Increasingly, some of the individuals who are referred to us for home share, are engaging in risky lifestyles. This might include using legal and illegal drugs, having unprotected sex, online gambling, illegal activity, etc. They may be unable to discern their level of risk and vulnerability and/or may not appear to care about the consequences of their chosen behaviour. They may simply be determined to exercise their independence to explore activities and adventures in the community in the ways they want.

Applying a safeguards lens in these situations is essential. In order to do this well, especially in these more complex situations, building an effective, honest, and trusting relationship that includes the individual, their home share provider, and you will be important groundwork.

Stepping back to explore can help you avoid a battle of wills that can get in the way of a healthy discussion about safeguards

It can be easy to become alarmed and to see the individual’s choices as self-destructive and ones that you and the home share provider should be working to eliminate to ensure they are safe. However, this approach will often alienate the individual and leave them feeling unsupported and even more vulnerable. Instead, taking time to learn about what matters to the individual and how the chosen activities may be meeting their needs is key here. Learning about the perceived benefits using a risk versus benefits lens, in conjunction with a harm reduction approach, can be a more neutral way to open up opportunities to explore ways to mitigate the risks the individual is taking while building new strategies to meet identified needs.



Education for both the home share provider and the individual is essential in order to candidly discuss the areas of risk and the safeguards which would be both reasonable and acceptable for the person in high risk situations.

#### An Example of Safeguard Planning

Jay has been telling his home share provider about his interest in exploring sexual relationships. He has been candid about his interest in relationships with both people who identify as men and people who identify as women. Jay has also been talking with both his home share provider and you about being unsure if he feels he is male or female. He has been exploring his curiosity by sometimes wearing women’s clothing, but typically dresses as a man.

Jay has worked at a local grocery store for three years, takes public transportation, uses a cell phone, and has been really successful navigating his community with a lot of independence. His independence has afforded Jay the opportunity to have some casual sexual encounters in the community which he has told his home share provider about. He has received some information about using condoms in the past. His home share provider does not think he is consistently using condoms though and is worried about him contracting an STD and/or being exploited and harmed in these encounters.

You conduct a review of his Vulnerability Assessment with him, his home share provider, and former staff person who has maintained a friendship with Jay over the years. Jay was really open and talked frankly about his interests with everyone present. His sexual health and personal safety were considered top priorities.

Informational resources to support his sexual safety and health were accessed (videos and written materials) for Jay to review. His friend offered to talk with Jay about the material. His home share provider went with Jay to the pharmacy to purchase condoms and also supported him to go to the local walk in clinic for STD testing. During the test, the clinician also provided him with information. Jay and his team also discussed consent and staying safe in sexual encounters. Jay was also introduced to a local organization hosting safe spaces to support GLBTQ2+ folks and he started attending social events they put on. Jay’s home share provider received resources to assist them in sexual health and sexual education. Jay and his home share provider agreed that he would call him if he felt he was in an unsafe situation, and that he would check in while he was out in the community. You maintain regular contact with Jay, and he is open with you. This allows you to continue to support him and his home share provider.

Monitoring and reporting by the home share provider has consistently kept the team apprised of the management of risks. Additional resources are offered when needed. Jay’s safeguards are reviewed every three months to ensure they are proving effective.

*We all have our own fears or judgements about the choices an individual might be making.*

* *Our fears or agenda may stop us from truly understanding the motivations behind a person’s choice. We may miss an opportunity to help them to explore other options to meet identified needs and/or to truly understand what is driving a behaviour.*
* *Our fears or agenda may cause us to use less empowering tactics such as lecturing, advising, guilt trips, fear raising etc. We may become less effective and miss out on a chance to support this individual.*

These conversations can be sensitive and take you into areas you haven’t dealt with before. You may need and want support to navigate them. Balancing the individual’s rights with the potential risks you see in their lifestyle choices are complex situations to navigate. Safeguards, while not capable of extinguishing every risk, will help reduce them and demonstrate a respect for the person’s right to self-determination in their choices. The need to support informed decision making on the part of the individual is central to considering safeguards. These situations will benefit from a team discussion, and the support of your [designated leader] even if you have dealt with similar circumstances in the past. Your emotions, anxiety for the person’s safety, and desire to prevent any harm from occurring to them are going to be in play. Having the benefit of conversations with your peers and leadership can help you thoughtfully explore and plan safeguards.

## 3. Managing Crises that Impact the Stability of the Home Share Arrangement

Your role as [Coordinator/Manager] includes the responsibility to manage crises when they occur with individuals and home share providers in our network. As referenced in Chapter 2.A., there may be times that an individual we support, or their provider, encounters an emergency situation that requires some form of immediate response to ensure housing stability. It is vital that we are always considering the succession planning and advanced crisis response options as part of our regular team meetings to help manage potential crises in a proactive way.

Examples of potential situations include:

* The current Home Share Provider experiences a health crisis and either ends the contract or cannot provide care for a period of time
* The individual has a health crisis and cannot return to their current living situation or can return but extra supports are required
* The home share placement breaks down and is no longer available to the individual

In these cases, our existing relationship with them behooves us to do our best to proceed with finding temporary respite and/or exploring a different long term arrangement with a known provider in our network.

Temporary Respite: [If your organization coordinates the recruitment of respite providers, insert your process here for how a candidate would be selected and the arrangements made for temporary supports to be provided to the individual].

When an individual requires temporary respite, it is important to carefully consider how to support them to minimize the distress of being rehoused, even on a temporary basis. Each situation will be unique to the home share situation. Some crises will require a faster emergency response than others.

### A. Finding a Temporary Option followed by Long Term Solution if needed.

#### 1. Explore the options for housing

a) Consider the needs of the individual:

* + 1. Review their personal profile and ensure it is accurate and up-to-date.
    2. Consider their care needs, age, and health. What type of home will be suitable for them?
    3. Review their activities and other commitments, such as work and volunteer schedules, to support thoughtful planning.

b) Consider the capacity of their family or the existing respite used by the home share provider.

1. Can a member of their family step in and offer support for a period of time? This would be a potentially easy transition for the individual to make if the relationships are healthy and their family can provide the care required.
2. Is their current respite provider able to provide the care required? This presents another strong option as the respite provider will know the person and be familiar with their support needs.

c) Consider what capacity exists within our organization?

1. Are there respite beds available in one of our staffed residences?
2. Do we have capacity in our dedicated respite resource?

d) Review the capacity within the network of home share providers affiliated with our organization.

1. Does a current home share provider have space in their home for the individual?
2. Will the individual they currently support be comfortable with someone else in the home?

e) Review your list of home share providers who have been approved but not yet matched with an individual.

1. Are there approved candidates who could provide the temporary support needed? This would also offer an opportunity for both you and them to understand the role and responsibilities and could be a long-term option if their current home share provider is not able to resume their responsibilities.

f) Utilize our network and connect with other agencies delivering home share in our community to explore their capacity to assist.

#### 2. Contact CLBC

You are responsible for documenting the emergency rehousing of the individual and providing that information to CLBC. Depending on the circumstances, the issues associated with the temporary housing arrangement may rise to the level of a critical incident. Ensure you follow our policy and procedure with incident reporting both internally and to our funder.

If the crisis has resulted in an increase in the support needs of the individual, ensure you request a Guide to Support Allocation review and/or access to temporary respite funding.

#### 3. Take care of the contract requirements.

Ensure you have a contract for the temporary home share provider which follows our policy and procedure regarding signing authorities.

#### 4. Introduce the individual, their supports, and the prospective provider.

Depending upon the timing, and the situation you are facing, it will be important to ensure that introductions are made to ease the transition to a new living situation.

Support the individual to organize the belongings they wish to have with them as well as those which are integral to their support.

#### 5. Facilitate the move.

Determine who has the strongest relationship with the individual and will take the lead on supporting the move to the new home. If the situation allows a short visit to see the new home, this may help with the transition. In other situations, the nature of the crisis may not provide much in the way of transition opportunities. Help the individual prepare for the move with as much information as possible. Endeavour to allay any anxiety they may be feeling and assure them that you are available to support them and will be checking in regularly.

Prepare an information binder with all the documentation required for the home share provider to understand the person’s needs. Ensure you review the information with the provider to answer questions. Provide any training that is required to ensure their safe and competent supports to the individual.

#### 6. Check In.

This temporary situation requires that your monitoring check-ins be increased to provide assurance of the comfort, safety, and wellbeing of everyone involved. Ensure you document your monitoring contacts fully. If a review of the Vulnerability Assessment and Safeguards is required, complete this process and add it to the record of the individual highlighting additional monitoring required, the frequency of the monitoring, and any additional safeguards which have been implemented.

#### 7. Review the situation.

Temporary situations sometimes extend beyond their estimated duration. Ensure you check in with everyone involved if the arrangement needs to continue and respond with any additional supports required or, in the least desirable situation, moving the individual again.

#### 8. Proceed with the Development of a New Home Share (if needed)

In cases where the original home share is no longer viable for the individual due to the crisis that arose, once a temporary arrangement has been made to house the individual as discussed above, you will need to follow the steps outlined in Chapter 2B of this guide to begin the recruitment and/or matching process with a new provider.

If there is no viable match located, and the temporary respite option cannot continue, you may need to request the involvement of a CLBC facilitator to explore options in a different residential setting or with a different agency who may have an available resource. While these are our least happy choices, the wellbeing of the individual and our capacity to meet their needs must be examined to ensure they are being supported properly and their rights and needs are protected.

### B. Accessing Extra Supports for an Individual

As noted above, there may be times that an individual has a health crisis that may require changes to his care and/or temporary hospitalization followed by a return to their home with additional supports needed. Part of your role will be to ensure that the home share provider has the resources/support they need to be able to continue to include the individual in their home. In some cases, this may require you to:

* Advocate with the funder for additional resources (OT,PT, or other specialized care) or for additional respite.
* Determine if the home share provider has the capacity to take on any new levels of support for the individual if this will be required.
* Coordinate/facilitate additional training for the provider to take on any new expected role.
* Negotiate a higher rate with the funder for the home share provider if they will be required to take on a higher level of support.
* Increase your monitoring and support for the home share provider and individual.

It will be important, in these circumstances, to work closely with [designated leader] to clarify your role and get their assistance to facilitate these changes with the individual and the provider.

#### Example

Michael has had changes in his swallowing abilities causing frequent hospitalization. The emergency room doctor during the last visit has recommended that he have a feeding tube inserted as a contingency in the event that his swallowing reflex becomes too compromised, and in order to maintain his high calorie diet. You arrange for a meeting with the health care team to discuss the issues and options with Michael’s family, his home share provider, his GP, and Michael. The risks of the surgery are discussed, and the training needs described. The home share provider confirms they are comfortable learning how to use the feeding tube and Michael and his family agree to this new responsibility in his care. You explore and confirm options to pay for the costs of the supplies and nutrition.

The surgery is successful. Upon Michael’s return home, the health nurse provides multiple training sessions with the home share provider and Michael’s parents. You attend to support the process. The nurse confirms the transfer of skills and signs off on the use of the feeding tube.

Your monitoring is increased during the first three months that Michael is using the tube feed to ensure his stoma is well maintained and the new nutritional route is successful. Training of the home share provider is reviewed annually by the community nurse and Michael’s dietician is supporting his nutritional needs with reviews every 3 months.

## 4.Other Crises Which May Require Your Support

Natural Disasters: Crisis management may also involve responding to local emergencies caused by weather, community health emergencies such as COVID, or in the case of BC, the intense wildfires that have occurred in many parts of our province on an increasingly frequent basis.

In these situations, your role is to help build capacity and contingencies that respond to the specific issue and take into consideration the mandates and directions provided by other authorities e.g., the provincial Medical Officer with COVID, the City or Regional District with evacuation alerts and orders, or the community health nurse for health issues.

Every home share provider should have an emergency evacuation plan in place to respond to fires, utility failures, medical emergencies, and other situations which threaten the health and well-being of the members of the household. Assist the home share provider to develop this plan and review it as part of your annual monitoring review. You can provide them with samples of our written emergency procedures for these incidents as examples of what they should have in place. Encourage the home share provider to practice with the individual how to exit the home in the event of a fire, what to do in the event of a utility failure, and where the location of medical supplies are. Highlight the need and benefit of the individual understanding how and when to call 911 and encourage regular reference, as appropriate, to this as a safety response every citizen has available to them.

Critical Incidents: Although every type of critical incident involving the individual will require your follow up, there may be some situations where your role in helping the home share provider and the individual to navigate the situation will be paramount. Some examples might include: an individual’s arrest or other involvement with the law, the individual is missing or wandering, the individual is in possession of a weapon, etc.

Our organization has protocols for all types of critical incidents you may encounter that you will need to be familiar with and reference so that you can provide informed and supportive counsel. It is also critical that you alert your [designated leader] so they can support you and ensure that all protocols are followed.

Example: The police call Mary, Joe’s home share provider, to inform her that Joe has been detained for allegedly attacking another individual with his army knife. The individual has sustained minor injuries and is adamant that Joe was the attacker. Several witnesses have confirmed this statement. The police say they have had to subdue Joe by cuffing him because “he was striking out when anyone gets near him”. They say he is now pacing, sobbing, and repeating, “I’m in big trouble now”.

Mary calls the HS coordinator in a panic. Mary says she knew this was coming…Joe had been talking about getting back at the guy in the mall who he says is always bullying him. They agree to meet at the police station. In consultation with her [designated leader], the HS coordinator explains the severity of the situation to Joe and gets his agreement to discuss his disability and his support needs. Together, with the police, they agree to take him home where he will be under house arrest until a meeting can be held with the RCMP and Joe’s support team to discuss next steps. The home share provider agrees to this arrangement and says she will debrief with Joe as she knows he is remorseful and needs help working through his emotions so he can join the team meeting tomorrow. The HS Coordinator agrees to contact a member of the local Restorative Justice team so that the option of supporting Joe to work through the issue with the person he assaulted can be explored. The RCMP are in favour of this option saying this may be a better solution for addressing this issue.

## 5. Monitoring Issues and Conducting Investigations

Your monitoring role will inevitably reveal issues in the service provided by some of your home share providers. These issues will vary in terms of their severity and potential impact on the individual being supported in the home or the provider. Managing them effectively and professionally is part of your role.



Oh no

Issues can emerge as a result of a number of things you observe from your monitoring contact. **Frustrating challenges** that may occur include:

* Consistent issues with submission of required documentation (e.g., reports, renewals of credentials, etc.)
* Breach of contractual responsibilities (e.g., contracting with another organization without notification, not confirming the suitability of respite providers properly, not informing of changes in the household)
* Health and safety concerns in the home (e.g., repairs not completed, unsafe conditions)

A. Actions to be taken: If you become aware of issues as part of your monitoring process, it is imperative that you clearly advise the home share provider of the expected practice.

Consider your analysis of what might be the cause of these challenges.

* Is this an opportunity for training?
* Is this a misunderstanding?
* Is this likely a one-time occurrence where correction will mean the issue is not repeated?
* What are the ramifications for the individual?

Consistently reference our [Home Share Provider Handbook] that forms part of our agreement with them and the directions regarding supports which are included in this resource for providers. Provide follow-up documentation to the provider indicating the issues which require remediation and the timelines for completing them. Ensure you circle back to confirm that the issues have been resolved. Create a reminder for yourself to monitor these concerns in successive visits with the home share provider to ensure they aren’t repeated.

More **serious** incidents and issues that may occur include:

* Allegations of financial abuse of the individual’s funds
* Neglect and/or abuse
* Medication mismanagement
* Failure to report critical incidents
* Use of restrictive practices without an approved Safety Plan
* Breach of the individual’s rights
* Critical injury or death of an individual

These incidents/issues require immediate action to safeguard the individual. In situations where the safety of the person is in jeopardy, they must be removed from the home and a temporary alternative found.

Contact CLBC and file a critical incident report in accordance with our policy and procedure. In conjunction with your liaison analyst, discuss the next steps with respect to an investigation of the issues you have identified.

CLBC may proceed with an internal review of the situation or depending upon the severity of the matter (e.g., neglect, abuse, failure to provide the necessities of life, death) can elect to refer the file to the RCMP. You are responsible for assisting with access to documentation as required.

Your [designated leader] will support you in the management of the communications with CLBC, access to and organizing documentation, and any internal review we conduct within our agency of the situation. In conjunction with CLBC, it may be determined that we will collect the details of the allegation, who reported it, any evidence provided, and conduct interviews as long as they don’t impede or interfere with any parallel investigations being conducted by either CLBC or the RCMP. The decision on who will take the lead and has responsibility to investigate a reportable incident must be discussed with CLBC and Manager in each occurrence.

It is important that you also pay attention to CLBC’s role and Adult Guardianship responsibilities. Their policy can be found at: <https://www.communitylivingbc.ca/wp-content/uploads/2018/08/Adult-GuardianshipandCLBC-2018.pdf>

B. Follow up. Actions with respect to the home share provider will be dependent on the outcome of the review which is conducted.

Should an allegation of abuse, neglect, financial exploitation, injury to the individual as a result of negligence, or other severe breach of contractual responsibilities be upheld, their contract will need to be terminated. Refer to contract language for notice requirements for terminations for cause versus ending a contract for another reason. Follow all of our documentation protocols re: the notice of termination.

Documentation associated with the incident, the findings, and the termination must be completed and included in the permanent record of the provider.

Should the allegations not be proven, it will be important to meet with the home share provider to determine if they wish to continue under contract. It will also be important to meet with the individual, to confirm if the home share relationship has been irrevocably strained because of the incident and should not continue. In these instances, planning for a new home share should commence.

## Chapter 6. Q and A re: Assessing Risks and Building Safeguards

What if I receive a message from the family that the home share provider is taking risks with medication administration?

**Organize your documentation:** Contact the family to discuss the issue and determine if they want to lodge a formal complaint. As outlined in our [Complaints Policy], document the call including: the reason for their concern, the specific issues they have identified, what their source of information is, the frequency of the issue, and what, if anything, they have done regarding their worries. e.g. have they spoken with the home share provider? Create a summary of your conversation ensuring your documentation is clear, objective, and accurate. If possible, confirm the contents with the family for any corrections or other details. Reassure the family that you will pursue the matter with the provider as part of your monitoring activities. Make sure they have a copy of our [Complaint Procedure]

**Review your documentation:** Look back on your monitoring notes regarding the discussions you have had with the home share provider about the administration of medications. Review the documentation confirming their competency based training. Assess whether or not you have had any concerns you have flagged for follow up.

**Arrange a meeting with the individual:** Inquire with them, if possible, about how they receive their medication, times, and the way in which it is provided to them e.g., in a pill cup, etc. Note any concerns from the information they provide to you.

**Arrange a meeting with the home share provider:** Indicate you have had concerns raised about medication administration and your responsibility to review the matter. Have them review their practice with you to confirm their understanding of the protocols. Discern if any flags come up as they offer the information.

**Assess the complaint and consider actions:** Decide if you feel the concerns may be warranted or if the complaint could be a misunderstanding or misinterpretation. If the complaint appears baseless, note that in your documentation. If the complaint seems valid, based on your assessment of the home share provider’s competency and protocols, provide a refresher on their medication training.

**Enhance your monitoring as indicated:** Depending on the medications the individual is taking and your decision regarding the competencies of the home share provider, increase the frequency of your monitoring to confirm that medication administration is being conducted as expected in the terms of the contract.

**Follow-up with the Family**: It will be important to confirm with the family that you have followed through and either confirmed the HS provider is meeting required standards and/or that action steps have been taken. Be sure to document this conversation on [complaint form]

**Be curious.** Is their attitude a reflection of not understanding the risk? Are they uncomfortable responding and therefore trying to downplay the issue? Explore the situation and the risks with the home share provider as a means of assisting them to understand the consequences of not using safeguards.

**Review the safeguards and seek their input.** Are there new ideas they have that can expand or refresh the safeguards? What are the things getting in the way of them being consistent? Unpacking these areas with the home share provider may provide you with clues about what is getting in the way of their consistency and support their adherence.

**Do they feel a sense of fatalism about being able to do anything to manage the risk?** Are they struggling to apply the safeguards because of resistance from the individual? Is the situation escalating and they feel helpless to intervene? These are difficult conversations when you sense that they feel powerless to keep the person totally safe. As mentioned earlier, our fears and judgements can get in the way of a successful conversation with the individual. The desire to impose restrictions and control the situation will not prove effective, nor is it ethical. Talking with the home share provider is important in order to navigate these tough situations and offer the less restrictive safeguards to support the individual.

**Ask for help.** These types of complex situations are part of monitoring home share. If you and the home share provider are increasingly anxious about the risks the individual is engaging in, ask for an opportunity to discuss the matter with CLBC and others who support the person. Make sure you invite and encourage the individual to participate so they can understand your concerns and the support that is being offered. Enlarging the circle of ideas and with them, the potential safeguards, may provide new options for consideration.

What if the home share provider is displaying a casual attitude towards the risks identified in the Vulnerability Assessment and is not consistently applying the agreed to safeguards?

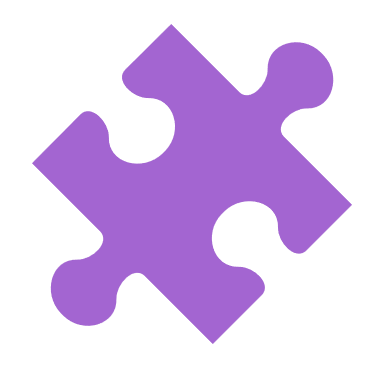
What if the family is really resistant to the individual expanding their community activities and personal support network?

**Show empathy for their concerns.** Many family members cite safety as their top priority and believe that people who are paid to be in their loved ones lives, present a safer option than unpaid community members. In reality, an expansive personal support network is a rich safeguard for everyone. Displaying empathy for their fears about the vulnerability of the individual is vital to being able to hold conversations about opportunities.

**Offer another parent’s or family members perspective.** Inquire about whether or not they would be interested in talking to another family about their experiences with personal support networks. The shared identity as family members may help.

**Provide resources.** The CLBC resources on Personal Support Networks, Safeguards and Vulnerability are available in hard copy and online. They offer an introduction to the concepts that the family can explore privately.

**Go slow.** Suggest the lightest approach to opening up the idea of community activities and where you feel there is the greatest chance of success. Work with the family to design the safeguards that are required and that they are comfortable with.



**Ending Home Share Arrangements and Moving Forward**

**Chapter 7**

# Chapter 7: Ending Home Share Arrangements and Moving Forward

## 1. The Decision to End a Home Share Arrangement

### A. When the Person Served is Initiating Change - Individual Choice and Control:



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Exercising choice and voice, in whatever way our voices are ‘heard’, are two of the hallmarks of expressing self-determination and control over the circumstances of our lives. Promoting individual choice and control with and for the people we support are core values and commitments of our agency. They are manifested in our responsibility to support the individual in determining their choice of a home share provider, and in regularly assessing and expressing how they feel about the relationship. Respecting their right to self-determination is essential when the person tells you, or otherwise indicates, that they feel somewhere else and someone else might suit their needs better.

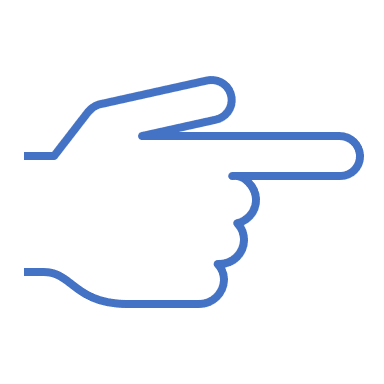
Given the work required to recruit home share providers, and successfully match people, it can be daunting to consider starting over particularly if the individual has some unique support needs. However, our focus must always be on the individual and what is in their best interest.

Sometimes individuals, particularly people who haven’t had many opportunities to stretch their self-determination muscles, may be reluctant to speak up about their desire for change. Your relationship with them, and the observations you may have about changes in their life, will offer a chance to gently inquire about their interest in a different home share setting.

In other instances, and for people where the excitement of change and choices is a powerful stimulus, discussions about shifting homes may be a regular occurrence. The challenge here will be to navigate what may be their inherent restlessness with the safeguard of a stable home.

If your monitoring conversations and other observations, with the home share provider, the individual, and/or their personal support network, indicate that the benefits of the living situation have been exhausted or the relationship has run its natural course, it is time to start planning. Rely on your relationship with them and the history of your conversations to guide you as you explore their interest in moving.

* Be curious about their reasons for wanting to make a move. Dig underneath the surface to understand their motivation. Could there be others influencing their decision? Has something changed in the household? Has someone else suggested they move? Do you feel their choice is freely made?



**Helpful Tips**

If you are concerned that the individual is being coerced to consider moving, this will require that you address that issue, especially if you are worried that another’s influence has the potential to make them more vulnerable and lead to the removal of safeguards which have been successful.

* Spend time talking with the person to explore what has worked well in their current living situation and what they feel they would now like to change. It is important to document these conversations for reference later by both the individual and yourself.
* Re-explore with them some of the initial questions you asked during the Intake process (Chapter 2A) knowing that their expanded perspective and experience will have likely added to their answers. Refer back to the things they told you then to open the conversation up even further. Make sure any new information is added to the individual’s personal profile for use in any new exploration.
* Be curious about what has changed in their responses – what new options, interests, or needs have emerged? Ask them to offer their ideas about what type of home share provider they feel will be most suitable for them at this stage of their lives.
* Consider if there may have been changes in either the lifestyle of the individual or the home share provider. Are their respective interests shifting? Do you see a gap between the preferences of the person and the energy of the household?

If you feel confident that the individual is ready for a change, then it is time to begin the planning process. Planning will benefit from reminding the individual, and their personal support network if appropriate, that just as it took time to find and establish the current home share arrangement, that finding a new living situation needs to be equally intentional.

Informing the home share provider, if they aren’t already aware of how the individual is feeling, requires diplomacy and tact on your part, particularly if you hope to retain them as part of our network. Preserving the skills and competencies of a strong home share provider is an asset we want to retain for a potential future relationship. It is helpful to support the individual to convey their wishes, if possible, versus acting as the messenger. This can be done by coaching the individual on how they wish to tell the home share provider and offering to be with them for the conversation.

Depending upon the individual circumstances surrounding a move, there can be a variety of contractual arrangements agreed upon. In some cases early notice is appropriate, in others waiting for the appropriate contractual period (i.e. 30 days) is advisable. There may be circumstances where you may need to move the person ahead of the 30 days’ notice but are contractually obligated to still pay the 30 days unless something else is specified in contract language around 'for cause'. Always seek the advice and direction of [leadership] to confirm the most appropriate course of action.

### B. When the Home Share Provider’s Situation/Capacity Changes

Changes can and will occur in the lives of home share providers which can impact on whether or not they are able to continue to include the individual as part of their home. Some of the changes that you might experience among home share providers include:

* A desire to retire from the responsibilities of providing support. This may be due to age, to lifestyle preferences, or that the energy and capacity of the home share provider to meet the individual’s needs is ebbing. Our monitoring role and conversations should always be alert to these signals. While a retirement date could be a ways off, the advantage of knowing that a change is anticipated provides more time for planning a thoughtful move.
* A move due to employment, education, or changes in family responsibilities. In some instances, a move to another part of the city or area, may easily and appropriately include the person served. Be sure to closely examine the impact for the individual to ensure that their activities, job, or network is maintained. In other situations, it is not possible to manage the logistics and/or interruption to the life of the individual receiving supports and a new home share provider must be found. Changes in family responsibilities could include taking on full time grandparenting responsibilities for a younger member of the family or a son or daughter moving home to attend university or because of other changes in their life.

Gradual shifts in the health of a home share provider. Changes in the ability to lift, provide personal care, or perform other responsibilities associated with the supports needed by the individual can require a new home share arrangement. Chronic, gradually shifting health conditions that weren’t previously a concern, may have escalated and are putting some strain on the home share provider. Again, your monitoring relationship should help you identify these as potential indicators of a future move so you can begin to hold conversations about capacity.

The quality of the relationship you have built with the home share provider is key to enabling the candid conversations that are required to talk through these changes in their lives. For some, this will be easier than for others. Some home share providers may feel guilty about letting you or the individual they support down and avoid the issue. Others may not appreciate the extent of the planning required to support a new home share arrangement. Still others may not be able to discern that their energy and capacity to provide the services is waning. All of these circumstances require your initiative and careful inquiry to have the conversations that safeguard everyone in the home share setting and facilitate change as needed.

#### An Example

Mary and her partner have been exemplary home share providers for Michael, an individual with multiple, complex health care needs who they have supported since childhood. He does not have any family involved in his life and the Office of the Public Guardian and Trustee act as his representatives. Michael is now a young man. Over the years, Mary and Jane’s home has been adapted to accommodate the various assistive supports required by Michael including installing ceiling tracking, a specialized bathtub, and even the addition of an elevator to access outside decks from the backyard. None of these have been easy to acquire.

Both Mary and Jane are now in their 60’s, and although the care responsibilities are becoming more onerous, the bond between this trio is profoundly strong and Michael has lived safely with them in the community. Although you are aware that at some point Michael’s support needs will be too much for Mary and Jane to continue with, finding another adapted home with trained nurses as home share providers is a tall order and you are worried. Respite providers have been difficult to recruit however two young people have been trained and have come into the home to care for Michael. Conversations with the home share providers have included references to their stamina and energy but for the most part, they have been reluctant to talk frankly about the future. There are no easy solutions emerging.

One suggestion which offers hope is to increase the amount of time the respite providers are engaged in Michael’s support to build a contingency for Mary and Jane. This involves negotiating extra funding from CLBC to enhance the support hours. While it will provide a short-term solution, longer term planning needs to occur. You are approaching the OPG to inquire about additional financial supports in partnership with CLBC and involving Mary and Jane in the conversations as much as possible. Monitoring visits are documenting any changes and concerns.

It is our practice to routinely engage in an annual review of all of our home share matches as part of considering any potential needs for a succession plan. This helps us maintain a proactive awareness about the stability of the relationships we oversee.

C. WHEN THE PERSON’S NEEDS CHANGE DRAMATICALLY

It is important that we maintain a perspective on the life circumstances for the individual and how they are changing. The Vulnerability and Safeguards Assessment is a vital tool for maintaining this perspective.

* Are their support needs increasing dramatically and beyond the capacity of the home share provider to safely manage?
* Is the current home able to accommodate changing mobility, vision, or other physical/sensory changes safely?

These changes signal the need to contact CLBC for a review of the Guide to Support Allocation (GSA) to determine if home share is still an appropriate support for them. Reviewing our agency’s capacity to provide an alternative living situation is part of the review. We may have suitable supports available in a staffed residence or an alternative home share location that can meet the needs of the individual. Ensure your review anticipates these changes.

## 2. Moving On/Changing Living Situations

### A. Supporting the End of the Shared Living Arrangement

Unless there is an urgent need to remove the individual from the living situation, it will be important to work with both the individual and the home share provider to plan the timing and steps to end their time together comfortably and respectfully, including:

* Setting the tone for the parting so that both the individual and the home share provider can move forward positively. Whether the end of the arrangement has arisen as a positive next step or as a response to a concern or upset affecting one or both parties, it will be important for Home Share Coordinators to normalize the experience so that any feelings of loss, sadness, blame, anger, or other reactions are acknowledged but do not unduly impact the experiences for either the individual or home share provider during this final phase of their time together. As part of this process, it will be important for Home Share Coordinators to support both parties to celebrate and/or recognize the positive experiences they have had together and to help both appreciate the proactive step forward they will be taking in ending their life together at this juncture. See more in 3.B below
* Exploring any factors that might impact the timing of the move such as:
  + If the decision is instigated by the home share provider (relocation, retirement, new job, changing health etc.), is the timing flexible or is there a fixed date?
  + If the decision is instigated by the Individual (moving out on their own, seeking a new provider, moving to a new community, moving to a higher level of care etc.), are there issues that might delay and/or require flexibility or is there a fixed date?
* Determining whether there is a need for any interim living arrangements for the Individual based on the timing identified above. If so, refer to Chapter 5.3.A of this handbook. Note: In some cases, where an Individual is seeking an alternate living arrangement more suited to their needs or preferences, the current home share provider may be amenable to an open ended termination date. In such cases, Home Share Coordinators must ensure they follow the terms of the [Home Share Independent Contractor Agreement] when providing notice to end the contract when a new living arrangement has been found.
* Working with the Individual and the home share provider to assist them in planning the move out. This can be done either with both parties together, or with each party independently based on their preferences. In cases where relationships between the individual and the home share provider have become tense, strained, or have broken down completely, you may want to take a more active role in planning in order to make it more comfortable for both parties to separate their lives including their belongings, personal information, and other aspects of their lives.
* Using time before the end of their life in their current home to help the Individual to transition to their new Home Share arrangement if this is the next step for them (See Chapter 4C of this handbook as well as details below in 3. Transition Planning and Making the Move a Success)

### B. Preparing to Develop a New Home Share Arrangement

Considering a change in a living situation provides an opportunity to review the documentation you have created with the individual to ensure it is an accurate reflection of their needs, their wishes, and their abilities. Although the person will have had some experience with home share now, making changes in their life and considering a new residence provides a wonderful opportunity to reinforce core messages and information about this choice of living situation. Our resources for individuals [Home Share Participant Handbook] are helpful to reminders for renewing information.

Remind individuals about the purpose of the information gathering and how it will help support a solid match with a new home share provider. Review the helpful tips provided in Chapter 2A of this handbook about asking questions to support frank and open conversations with everyone.

Consent Forms – Take the opportunity to review the consents that are in place and ensure that everything is up to date to enable the appropriate conversations and exchange of information as you proceed.

Personal Profile – Review the information that was collected at Intake. Use this as a chance to reflect with the individual, and their personal support network, about new information that is important in the considerations of lifestyle, location, household composition, and so on. Encourage the person to take time thinking with you about what has changed and what may have emerged as important now in planning for a new home.

Vulnerability and Safeguards Assessment – If there hasn’t been a recent update, make sure to review and renew areas of vulnerability and the safeguards which have proven to be effective for the individual. Do some preliminary thinking about potential areas of vulnerability that may need a different lens, or safeguards that could require strengthening, as a result of a move.

Other documentation – Consider health care plans, behavioural support and safety plans and needs, person centred plans and quality of life statements, and any other documentation that will be relevant to building a current picture of the person. Make sure all of the information is current to support the best outcomes for the individual.

As you proceed with assessing the individual’s needs and preferences, it may be prudent to also consider contacting a CLBC Analyst regarding resource implications and/or the person’s Facilitator with regards to a move. Their role and responsibilities dovetail with our own.

### C. Diligence in the Process

It can be tempting to try and move quickly to support a change however, the processes you used at the outset of our relationship with the individual should be employed again. These are highlighted in Chapters 2A and B and 3A and B.

It is important to proceed through the steps in the process with the same intention and due diligence. This process remains:

* Setting realistic timelines
* Moving through the matching process
* Contracting and onboarding the home share provider, and,
* Establishing the new living arrangement

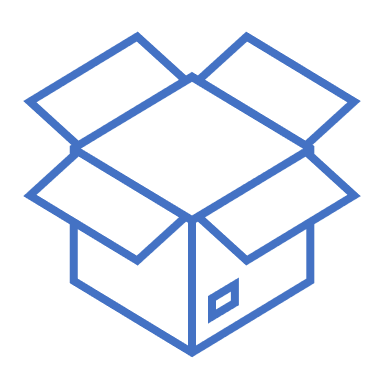
## 3. Transition Planning and Making the Move a Success

When an individual moves from one home share provider to another, they will experience 2 distinct transitions:

* The transition to a new home.
* The transition from their current home.

It is important to recognize these two very different transitions and how they might impact all involved. Part of your role will be to help each of the parties to recognize and navigate the mixed emotions they might be experiencing as they prepare for and engage in these transitions.

### A. Transitioning to the New Home



New Address

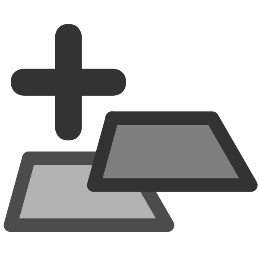
Chapter 3 C of this handbook outlines our process for supporting a transition for the individual and their new home share provider. Our [Transition Planning] form is an essential document to assist with supporting the process. It is also important that this new relationship start off well with the home share provider and individual considering how they want to live together through the creation of an agreement. If you are supporting a transition with an experienced home share provider, there should be a greater degree of familiarity and comfort in accommodating the transitional processes. However, it is still important to take the time to review documentation and any unique support needs or lifestyle preferences the individual has. Don’t take things for granted – proceed with diligence and ensure your documentation is complete and accurate. Encourage everyone involved to take the time to navigate the steps and stages of building the relationship to support stability and success.

#### Anticipate an Adjustment

Adjusting to a new provider can be challenging for some individuals especially when the choice to move has not been initiated by them and/or the home share arrangement ended uncomfortably. In some cases, if the former arrangement ended unexpectedly, they may be going through grief and loss or other types of trauma specific to how it ended. In other cases, where their changing needs or behaviours prompted the end of a Home Share arrangement, they may have some associated feelings of disappointment in themselves, embarrassment, or resentment that could play out in their response to their new home share provider.

You may find they engage in behaviours that may be upsetting for the new provider such as:

* Comparing them to their previous provider.



Old

New

* Talking about how much better it was there.
* Insisting the previous provider gave them more latitude about household chores.
* Resisting engagement - closing off from a relationship with the new provider.

It is a good practice, where possible, to take time to talk about the situation that prompted the change with the individual, prior to their transition to their new home or, as soon as possible after the move. Although you might have done this already at the time of the decision, it is important to revisit as part of transition planning to help the individual think through how they might manage any feelings that are arising with their new provider.

Part of your approach should include helping all involved to recognize and ‘normalize’ the feelings and subsequent behaviours the individual may display. In this way, you can better help them to navigate what’s going on and take the ‘edge’ off any personalization or judgement they may be holding.

Your role might involve helping the individual to talk about their feelings with their new provider so these are out in the open and the provider can learn how to best support them. In some circumstances where feelings are complex and/or magnified, there may also be a need for you to help the individual and their personal network (if applicable) explore natural or professional supports that can help the individual work through any bigger feelings arising. Be sure to engage your [designated leader] to support you in navigating these situations.

#### An Example

Matt started with a new home share provider after living with John, his previous home share provider, for 8 years. Matt and John had had their ups and downs but developed a deep bond that both men seemed to value. However, during their last 3 months together, John had been complaining about Matt’s behaviour and both Matt and John reported that they were constantly fighting. Matt complained that John wouldn’t get off his back and John countered that Matt was engaging in risky behaviour he couldn’t tolerate. The HS Coordinator had worked with both John and Matt to try to resolve the issues but finally, John called to say he was ending the agreement and said he was firm in his resolve because he felt his emotional health was at risk.

In debriefing with Matt, the HS coordinator became aware of the disappointment and regret Matt was feeling that was just below the surface. He talked about how he blew it with John and how John let him down even though they were good buddies. He said he wished John hadn’t got so freaked out because he feels he lost a good friend. However, to John, Matt presented as angry and resentful and refused to engage. The coordinator was concerned that these feelings would impact Matt’s willingness to get close to the new providers and voiced this concern to Matt. Together, they decided to talk with the new home share providers, Shirley and Bill about Matt’s feelings and his need to have more control in his life. Matt was reluctant to talk about his feelings at first but, with coaching, he opened up to talk about “not wanting to blow another living situation” but also about not wanting to have his life controlled. He was then able to share how sad he felt about losing John’s friendship and his worry that it would happen again with them. This led to some good discussions that helped all 3 start to think about ways to build the relationship and support each other’s rights while also respecting each other’s concerns. The Home Share Coordinator talked about other safeguards that might help Matt. They also talked about how they might support Matt to reconnect with John in a new way because they shared so many interests.

Although this discussion didn’t eliminate the issues they faced at the start of their lives together, it did set the stage for them to work things through. Matt has been living with Bill and Shirley for the last 13 years and John now provides respite!

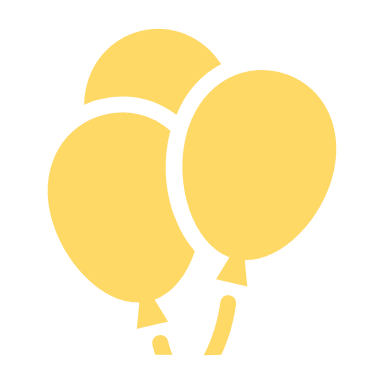
#### Tailor Your Check-ins:

#### Support the new relationship with the same monitoring schedule as you would any developing relationship, taking into account any transition challenges you may be anticipating. Your check- ins can assist with managing the transition process and any bumps that may occur as the household gets to know each other. Ensure that all check-ins are documented in our [Contact Log] according to our timelines.

#### Attend to the Details:

Ensure you manage the details associated with an address change, including:

* complete a new Shelter Form and submitting to MSDPR (PWD) and an address change with Services Canada (CPP/OAS/GIS)
* complete an address change for mail
* notify friends and family
* provide address change to CLBC
* ensure our documentation is current with new information.

B. Transitioning from the Previous Home Share Provider

#### Honouring the Relationship in the Transition Process

When a home share situation ends, it is important to take time to celebrate the relationship (where appropriate) and acknowledge the change that is occurring. If we have done our work carefully and supported a solid match, then a positive experience of living together will have had a lasting impact on everyone involved. Even if, for some reason, the living situation has fallen apart, marking the transition helps to recognize the connection that has been made and confers value on the relationship.

#### Celebrating:

Encourage the home share provider and the individual, and their personal support network if applicable, to think about the ways they could celebrate the transition they are experiencing. They could plan a party and invite friends and family to attend. They could put together a photo album so that favourite memories are readily available to enjoy. If they are feeling creative, they could make a video of them doing things together that could be watched at their leisure. Videos and photo albums have the added advantage of working well for people who may enjoy the chance to hear and see favorite images very frequently. It is only the limits of their imagination and creativity that limit the options that might be chosen.

This form of celebration can be equally important when the home share provider is not able to engage due to illness or passing. Creating a memory book or video with their personal network and/or with their new provider can be an important way to honour the important role the provider played and to help the individual work through their grief.

Note: It is important to remember that, even if the relationship has broken down between the individual and the home share provider, they have shared their lives together and may have built attachments to others in the household or with other members of the individual’s personal network. Honouring each other and the others with whom they have become close can help each party to feel a sense of closure no matter how small the gesture they make turns out to be. Home Share Coordinators can offer, but not force this opportunity, by helping both parties to see the value of it.

Planning Ongoing Connections:

Transitions also invite an opportunity for both the home share provider and individual to think about how they might want to stay connected in the future. If an ongoing connection feels like a viable consideration, then supporting their conversations about how they will remain friends is important. Perhaps they are interested in making plans for regular coffee dates or dinners out. Going to a movie or a Saturday afternoon shopping trip might be a choice. Encourage the home share provider and the individual to think about how they might maintain their relationship outside of sharing a home together.

If it seems appropriate and helpful, the transition process and celebrations may be opportunities to include the new home share provider into the circle. The experience of the transitioning provider could, if welcomed, provide helpful information and ideas about successful ways to support the individual in the same ways that members of the individual’s family or personal support network can provide supportive suggestions and reinforce the needs and preferences of the person served.

#### An Example

Mark has lived with his current home share providers for 5 years. He has always wanted to have his own apartment where he has more privacy and independence. Mark takes some medications to manage his diabetes and is now quite stable. With his home share provider’s support, he has been learning to manage his medications and has also been developing some of the skills he knows he needs to have to manage in his own place. He mentions his wishes more frequently in his regular conversations with you and his home share provider feels confident that a semi-independent situation would work as a transition and support Mark’s goals. You begin planning for a new move as a team. Mark agrees that the idea of a suite in a house with daily check-in’s is a great next step for him.

You update Mark’s information with him and his home share provider and explore what safeguards would assist him to continue to be safe with his self-management of his medications, diet, and daily living needs like cooking, cleaning, etc. Mark works in the community and a new place needs to be close to work and the bus lines. After exploring options with Mark, you identify a home share provider in your network with a vacant, self-contained suite in their home that might be workable. You and Mark visit the location and see the place. He is thrilled and makes a good connection with the provider who you know has solid risk assessment skills and can mentor Mark as needed without cramping his style.

Together with Mark’s current home share provider, you plan the move and help arrange for some additional furniture for his new place. His home share provider helps to complete a comprehensive summary of Mark’s abilities and areas where he needs support as well as strategies that have been successful. A Vulnerability and Safeguards Assessment is also renewed, and appropriate formal and informal safeguards are discussed with his new home share provider and Mark. Mark’s medications are in a blister pack and his provider checks once a day that he has taken them. Mark has a small repertoire of meals he can cook and is learning more with the help of his home share provider and by attending a cooking class. The move is successful. He and his long term provider maintain contact. Mark is on his way and looking forward to inviting his friends over for visit in his new place!

## 2. Terminating Home Share Arrangements

Your role will require that you complete the administrative responsibilities associated with terminating a Home Share. Some terminations will simply be the outcome of a decision on the part of the provider to give notice on their contract. Other situations will be the result of your determination that the home share provider has proven to be unsuitable for the role or in contravention of the terms of our contract with them.

### A. When the Contract Termination is Planned

#### Required Notice

### B. When the Contract Termination is Unplanned

In the event that a contract is terminated due to a circumstance beyond our control such as the death, hospitalization and/or other crisis experienced by either party, it will be important to seek guidance from your [designated leader] to ensure that the termination is handled respectfully and according to the terms and conditions of our contractual agreement. These are challenging to navigate and can be highly emotional for you as well as the individual and/or home share provider (or their family). Make sure you have the support you need to handle this process well.

### C. When the Contract Termination is For Cause

Your role requires that you take responsibility for acting on concerns about the quality of care and health and wellbeing of the individual in the home share situations we coordinate. Unhappily, this responsibility will include some occasions where a home share arrangement, and the contractual relationship with the home share provider are terminated. These situations can be very stressful and difficult to manage. When they emerge, it is important that you include your [Designated Leader] in the process to provide you with advice and back up should the need arise.

#### Steps in the Process of Terminating a Contract with Cause:

Follow our policies and procedures regarding contract termination. This will involve the [designated leader] composing a letter advising the home share provider that you are giving notice on the contract citing the areas of deficiency. Ensure that you provide notice in accordance with the terms of the contractual relationship. The only exception is in cases where you are initiating an immediate termination for any of the causes cited in the Termination Clauses which form part of the contract.

Even in case of immediate termination, we may still be required to provide payment to the home share provider for services delivered up to the termination date.

Ensure that all documentation associated with the home share provider is complete and retained according to our policies and procedures for archiving information.

### D. All Contract Terminations

The following key areas must be addressed for all Contract Terminations

#### Checklist of Items that Must be Returned

It is important that you review and follow through to ensure specific items associated with the home share are returned. These items include, but are not limited to:

* All paper documentation associated with the individual, their services and supports. This includes all financial records, legal documentation, and medical information.
* All personal belongings of the individual – typically transferred in the move to another home share setting or other residential option.
* Any assistive devices or mobility aids which have been used in the home.
* All personal identification, bank cards, and financial information if not carried by the individual

#### Finance and Payment

You are responsible for alerting the [Finance Department] about the upcoming contract termination with dates and details so they can close out the home share provider’s [payment system]. Any remuneration owed to the home share provider is calculated and payment is provided via our [Finance Department].

#### Continued Confidentiality Requirements

It is important to remind the home share provider that they remain responsible to maintain the confidentiality and privacy of the individual they have supported even after the person no longer resides with them.

#### Notification to Funder

You are responsible for contacting the Funder to inform them that the Home Share arrangement has ended and to update them on the current status of the Individual

#### Exit Interview

Within a week of the contractual relationship with us ending, [Name of Organization] has a practice of inviting home share providers to participate in an exit interview. It is important that you inform them that they will be receiving this invitation and encourage them to be open and honest in their feedback. Although the interview is voluntary, we hope that they will agree to provide us with feedback. Their input is recorded on our [Home Share Exit Interview form]. This information is used to enhance our services and performance improvement planning for the program and our organization.

In situations where the end of the contractual relationships is contentious, an exit interview is likely not going to be possible to complete. Use your judgement to manage these circumstances.

## Follow Up and Evaluation: What Can We Learn from Endings?

### A. Team Evaluation

Both successful and unsuccessful home share arrangements provide opportunities for us to improve our Coordination practices. In that spirit, we conduct an evaluation of each concluding home share relationship to determine what was successful and where we have identified pinch points we need to attend to. These evaluation conversations occur as part of our regular home share team meetings. The information from these evaluations is rolled up to support our ongoing quality assurance activities.

### B. Responsibility to the Individual

If, in the process of a home share relationship ending, the individual is no longer served by our organization, we have a responsibility to create an exit summary of our services and support to them. This exit summary will be prepared in accordance with our policies and procedures regarding timely documentation and provide a summary of the results of the services the individual received.

Copies of this summary information will be provided to any new service provider (with the individual’s permission), CLBC, the person served, and also retained in our program documentation.

## Chapter 7: Q & A Ending Home Share Arrangements

What if the home share provider threatens to terminate the contract when asked to meet documentation requirements?

What if the new Home Share Provider reports they can’t live up to the legacy of the previous provider who the individual holds as the ideal? They want to end the contract.

**Be curious about the issues with providing documentation.** Is the home share provider under stress in another part of their lives which is impacting their reaction to our requests? Are they having challenges they have not disclosed with respect to understanding what is expected? Are there literacy concerns that we should work with? These may be extenuating circumstances impacting on the resistance of the home share provider that led them to make ultimatums. It is important to dig deeper to discern what might be going on that we aren’t aware of.

**Is this a pattern of resistance that has its roots in previous contracting relationships?** Some home share providers who have had direct contracts with CLBC or even other agencies, may have had very different expectations regarding documentation. It is important that you reemphasize the onboarding discussions you held with them about their responsibilities and the terms and conditions of our contract with them to confirm our processes and accountabilities.

**Ensure your documentation is complete.** Monitoring visits and follow up documentation provide a critical paper trail to confirm the issues of non-compliance with the home share provider. Our responsibilities as an agency under contract with CLBC require that our monitoring role is confirmed by supporting documentation submitted by the home share providers. Our accountabilities cannot be met without this responsibility being fulfilled.

**Engage in performance management.** Provide written letters of expectation to the home share provider that document our consistent messaging to them. Escalate in accordance with our performance management procedures up to termination if required. Engage the support and advice of [designated leader] to assist in managing this situation and making the determination of contract termination.

**Listen with empathy.** A new relationship takes time to develop and if the home share provider feels like they are regularly being compared to someone else, it can impact on their confidence and commitment to working on the connection. Focus on strategies for developing a bond and reinforce the gradual pace needed and assist with providing the home share provider with ways to respond to the comments.

**Speak with the individual.** The transition from one home to another will be emotional even if the reasons are positive and the move has been well planned. Acknowledge the experience the individual is going through and their sense of grief, confusion, or disappointment with the change. Provide support to help them process the experience and shift their focus to the new opportunities ahead.

**Support the emerging relationship.** When you meet with the home share provider and the individual together, ensure you emphasize their successes and the positive things that are happening to reinforce the opportunities ahead. Don’t deny the emotions but instead assist with strategies for them to process the transition as a team.

What if the home share provider and individual want to move to another region and retain their living arrangement?

What if the individual is restless and wants to change home share providers frequently?

**Follow the process.** Home share providers have changes occur in their lives which may necessitate a household move. A deep and long-term commitment between them and the individual they support, may be spearheading this idea. If this type of proposal is suggested by the home share provider, it is important that you confirm that this is truly the wish of the person and has the agreement and support of members of their personal support network and legal representatives in order to proceed with any action on our part.

**Work with CLBC.** Any move to another community will require the involvement of CLBC to support the home share provider’s attachment to a new agency for coordination and funding transfer. It is important that you emphasize the necessity of planning to accommodate the role CLBC plays in supporting a move. Your liaison role with our CLBC Analyst can assist in informing the Authority of the intended move and transition responsibilities.

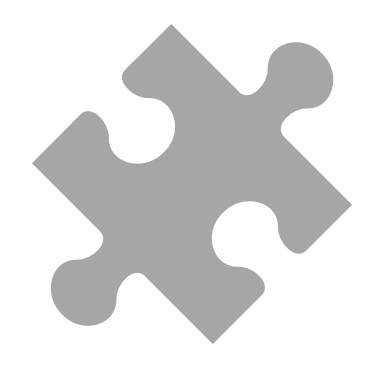
**As the move proceeds.** Complete the required contract and transition planning processes including the preparation of an exit summary for the individual. Assist with facilitating the move, by assisting with offering informational resources appropriate to their new community, if appropriate.

**Stay curious about their motivations.** Many individuals with developmental disabilities may have had limited opportunities to exercise control over the lives and are excited to be in charge of decisions about where and who they live with. This can have ramifications if they want to exit living situations rapidly both in terms of your work in recruiting providers and potential risk in the stability of their housing. It is important that you work to unpack the reasons why the person feels they want or need to move in order to consider an appropriate response.

**Rights must be balanced with responsibilities.** If the individual has a legitimate reason to move, it is our role to support a transition for them. If, however, you feel that the person is working to develop maturity in understanding the consequences of decisions, it will be important to work with them to discuss the ramifications of frequent moves and the potential challenges you have in finding other places for them to live.

**Conflict resolution strategies.** If the motivation behind requesting a move feels like an issue that can be resolved with your support, then it is your responsibility to assist with resolution of the conflict or misunderstandings that may be presenting themselves. It is important not to assume fault on either side but rather, to take a thoughtful and measured approach to talking with everyone involved to understand what is at the root of the desire to move.

**Consider strategies that address everyone’s needs.** Ensure there is a plan for implementation and follow up. Consider any vulnerabilities and safeguards that are required. Document, document, document.



**Your Role in Quality Assurance and Continuous Quality Improvement**

**Chapter 8**

# Chapter 8: Your Role in Quality Assurance and Continuous Quality Improvement

## 1. Staying on Top of Administration Responsibilities

### A. Tracking and Documentation

To promote the continuity and quality of services, you are responsible for ensuring all paperwork is accurate, complete, and up to date. There are multiple touchpoints where tracking and documentation is required. It is important for you to establish a system that works for you for ensuring you stay on top of these requirements. If documentation is not your strength, you will likely want to seek the guidance of your designated leader and/or others on your team to learn some tips from them.

Key Touchpoints

Your documentation should tell the story of the service for each individual served, and for each provider in a way that anyone on the team can follow. When you are documenting, it is helpful to consider the level and type of detail you provide through the eyes of a reader who is unfamiliar with and needs to pick up where you left off at any time. Be sure your documentation is completed as soon as possible after each interaction.

#### Home Share Provider Screening, Assessment and Pre-Approval

Our documentation for Home Share Providers starts at the pre-screening stage. We want to add ALL inquiries to our Initial Contact Log so that we can track outcomes of our initial screening. That way we have clear documentation that explains why we made a call to proceed or not proceed with someone\*. If we proceed to the assessment stage, we transfer info to the Home Share Assessment Summary which we will continue to add to during assessment up to and including our pre-approval decision

Pre-Screening

Assessment

Pre-Approval

Decision

Initial Contact Log

Home Share Provider Assessment Summary

Home Share Profile

The Initial Contact Log is an important record that holds the history of all contacts made with people who have expressed an interest in Home Share. It is important that you clearly detail your pre-screening interview and the results of this initial conversation especially when a decision is made not to proceed. You will need to ensure you document any reasons the inquirer gave for not choosing to proceed and/or any flags/concerns you had for not proceeding.

This type of record has proven invaluable as a reference when recruiting for new home share providers so that we have a ‘heads up’ when someone applies again, and we can stay attuned to any flags noted previously.

The Home Share Provider Assessment Summary is our running record of our initial pre-screening, full assessment (including home study) and pre-approval decision with each applicant. It is critical that this assessment be a comprehensive summary of all learning about the provider that can help all involved with understanding the applicant and their fit as Home Share Provider. Anyone reading this summary should be able to clearly understand the pre-approval decision made. All paperwork collected during the assessment phase must be attached to this assessment summary for easy verification of required documentation.

The Home Share Provider Profile will only be developed for pre-approved providers and can be pulled directly from the Home Share Provider Assessment Summary. This profile becomes an important reference for all members of the team when seeking potential matches for any individual. A copy of this profile must be reviewed with the pre-approved provider to confirm the accuracy of the information prior to its use in the matching process. This step ensures a double check of the information gathered.

Because we may not be matching each applicant right away, make sure to keep this profile updated with any new information gathered about the provider even after the pre-approval decision. For instance, you may learn new things about a provider during introductory sessions with an individual who might be a potential match. This information might be helpful for future matching if this match is not successful so make sure it is documented.

#### Active Home Share Providers

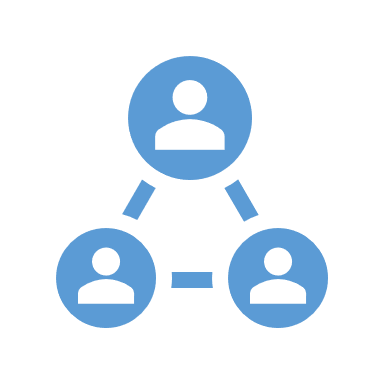
Once a home share arrangement has been made between an individual and a Home Share Provider, all interactions specifically with the Home Share Provider along with all required paperwork must be maintained so that the Home Share Provider record is always up to date.

This record should include:

* Contracts: Your records should include the initial contract signed with the provider and all subsequent renewals. It is important to ensure that the notes of each meeting you have to review and renew the contract each year with the provider are attached and/or linked for easy reference. This practice provides a clear record of your due diligence in assessing the performance of the provider prior to approving a renewal.

*The Home Share Provider record should tell the story about all your support for, interactions with, and other interchanges you have with the Home Share Provider. Having this running record helps everyone involved to stay up to date on what’s happening with each provider. It can also be helpful to reference back to before each monitoring visit so you have a quick snapshot and can be sure to follow up on anything that has come up previously.*



* Training and Required Documentation: The Home Share Provider Training Record is your place to track all training you have delivered and/or helped to coordinate including incidental training you may provide as part of your monitoring or follow up with a Provider to address issues that arise or the changing support needs of an individual.
* Monitoring Visits: Quarterly monitoring visits and all follow up arising from them need to be tracked using the [name of form(s) you use]. Because actions arising from monitoring visits may involve required documentation that you track elsewhere i.e., first aid certificate added to Home Share Provider Training Record, it will be important to set up a system for confirming completion of this action step on your monitoring visit documentation so that it is clear all action steps from each monitoring visit have been completed.
* Check-ins: Phone, e-mail, text, or other forms of contact initiated by you, or by the Home Share Provider should be tracked using the Home Share Contact Log. Having these all in one place makes it much easier to follow conversation threads and the support you provide incidentally to each provider.
* Changes/Things of Note in the Household: During monitoring, check-ins, or other contact with the provider and/or the individual, you may learn about changes that have occurred in the household (i.e., an extended family member moving in) or other things of note (i.e., mention of the Home Share Provider’s elderly parent requiring additional support or of challenges the Home Share Provider is having with their teen etc.). Because these will be important to monitor as part of ongoing support to the Home Share, these should be documented and added to the Vulnerability/Safeguard Assessment so they factor into your decisions about the type and frequency of check-ins and monitoring you build into your support for the Home Share.

#### Individuals Seeking Home Share Arrangements

Initial Information Gathered as Part of the Intake Decision

Like all individuals seeking services through [name of organization] programs, their intake information and all information gathered about them to make an intake decision must form part of their individual record including all relevant consent forms. If the individual chooses not to move forward with service and/or we determine we do not have capacity to serve them, this record will be maintained to preserve the history of their initial application/referral. If we proceed with developing services for them, this information will form part of their ongoing service record.

It is essential that you ensure this record includes notes documenting all interactions with the individual and/or their personal network, copies of all documentation received from them or completed with them, and any records of consultations with others (funders, professionals, personal network members) that were used to make the initial intake decision.

Information Gathered to Proceed with Service Development

Orientation to Services: Once the decision to proceed with service has been made, the individual should be set up with a program start date and all documentation of their orientation to services should now be added to their record using [name of form].

Personal Profile for Home Share: All information gathered to develop the individual’s personal profile for home share can be entered on the [Individual’s Personal Profile for Home Share Form]. This will be a work in progress that might be further refined as you get to know the individual and they become clearer about their preferences as they meet and explore potential providers. It will be important to keep updating this profile so that it can be as relevant as possible for your home share development efforts.

Vulnerability and Safeguard Assessment: Like the profile, this assessment should be a work in progress that will eventually be updated to reflect relevant details about the chosen provider. You will have started this assessment as part of your initial application process with the individual. Be sure to add all relevant details to the Vulnerability and Safeguards Assessment form so all information and any updates are in one place and can effectively guide your service development.

Home Share Development: It is important to track all efforts made on behalf of the individual to develop a home share arrangement for them. Tracking should include:

* All recruitment efforts – dates, details and results.
* All *Home Share Provider Profiles* presented to the individual for consideration and the decision about each.
* All subsequent interactions with Home Share Candidates that you arrange for the individual up to and including the decision to proceed with a specific Home Share Provider.

Note: Tracking these efforts is important both to demonstrate our efforts on behalf of the individual and also to measure the efficacy of our efforts. Knowing the average number of providers explored or the average time taken to find a suitable home share arrangement, can help us in our work with future individuals and providers.

*The Individual’s Record should tell the story about their home share experience and all the ways you have been involved in supporting it. It should show your active engagement with the individual to be sure they are having a good life in their home as well as your follow through on any issues or concerns they raise or that have been identified in relation to their:*

* *quality of life*
* *overall health and wellbeing*
* *the capacity of the home to meet their needs.*



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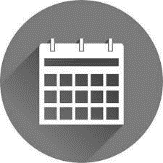
#### Individuals Living in Home Share Arrangements

Each individual will have their own record that needs to be maintained to help us keep track of all our supports to them throughout their involvement in our program and the home share arrangement we have developed for them.

Important Information to include in this record:

* Setting up their life together with their new provider: Details of all transition/move in support provided – these can be added to the contact log you use to track interactions you have with the individual. It can be helpful to code it as transition support so you have a simple way of identifying this type of support.
  + As an additional safeguard, it is useful to include a copy of their personal inventory of belongings they created when they moved in so that there is a back-up copy.
  + It is also useful, if they develop one and are comfortable sharing, to include a copy of their Agreement they made regarding how they want to live their lives together. As mentioned previously, this can be a useful reference to bring forward and adapt or build on if they are starting to experience any challenges in their home.
* Ongoing Check-ins: Whether in person, by phone, e-mail, text or other means, all communication you have with the individual should be documented using the contact log. Again, it can be helpful to code these communications so that you can also track completion of the required discussions we ask you to have with each individual to support their quality of life including:

Do you have a reminder system set up to help you track all the required touchpoints for each individual and each provider? Make sure you have a system set up for yourself that you can follow easily so you don’t miss important timelines for check-ins, paperwork, and other supports.



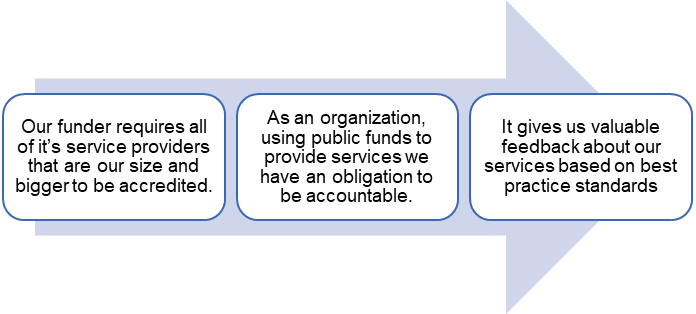
* + 1:1 check ins during monitoring visits
  + Rights reviews (these need to be done annually in ways that are meaningful to the individual)
  + Periodic check ins as outlined in their Vulnerability and Safeguards Assessment
  + Any other contacts initiated by the individual and/or that you initiate
* Quality of Life Reports: All Quality of Life Reports completed by or with the Home Share Provider should be held in the individual’s record. It is your job to ensure that these are done according to our timelines and that any follow up arising from them has been completed and documented.
* Incident Reports: It is important to track all incident reports submitted about each individual as well as completion of any required follow up. These reports help us to understand any areas where further support may be warranted. Having them in one place also helps us to pay attention to any trends and/or trigger factors that may need further attention, so we don’t miss any new or emerging needs of the individual. Home Share Providers may need coaching in how to effectively write reports so that they are objective, include all relevant antecedents and action taken. Be sure to take time to read reports thoroughly and provide support where needed so Providers feel confident and comfortable completing these well. NOTE: There may be times you find that, when meeting with an individual or the provider, you learn of an event that should have been reported as a critical incident. It will be important for you to work with the provider to ensure this report is completed and to follow-up with the CLBC or other funding representatives to explain the situation. These instances should prompt further training with the provider on critical incident identification and reporting so that further situations are not missed.
* Annual Health Care Check-ups: Providers should be ensuring that individuals have their annual medical, dental, hearing, and eye check-ups and confirming these visits as part of the Quality of Life Report with any details about the individual’s condition noted. It is your job to ensure that these are reported and documented annually and to follow up if any have not been completed. If individuals have medications they are taking, the annual medical check up should include an annual review of their medications or be scheduled separately.
* Other Health Care Visits: Again, the Quality of Life Report should include details of all other medical appointments – date, practitioner, focus and results. Checking in as part of your regularly scheduled monitoring sessions can be one way to ensure that you don’t miss learning about these appointments and adding them to the report. While they may appear insignificant in the moment, having a running record of all these appointments is important for helping to flag emerging issues that a single appointment may not prompt.
* Medication Management/Administration Records: Each individual’s record should include an up to date list of all ongoing and prn medication they have been prescribed and any over the counter (OTC) medications unless the individual is in charge of and does not require any involvement from [name of organization] for their medications, they choose not to share this information with us, or they do not take medications. The Home Share Provider is responsible for ensuring that any changes or new prescriptions are submitted to you to ensure the individual’s record remains up to date. A good practice is to follow up with providers after the individual’s annual medical check-up during which time ongoing prescribed medications, written prn protocols and/or written authorization for any OTC medications must be reviewed and signed off by the health practitioner. That way you can catch any changes they may have forgotten to report and ensure this annual review has taken place and is documented.

As part of their contractual agreement with us, HS Providers who are involved in medication management (storing and monitoring medication use for the individual) and/or medication administration (helping the individual to take their medication), are required to keep documentation of all medication use. They may choose to use our Medication Administration Record Template or one of their own that contains all the same information. In either case, this documentation must be made available to you during monitoring visits so that you can confirm the individual is getting all medications as prescribed. It is your job to document this review in the individual’s record so there is a running record on file of this review and any corrective measures if any concerns have been noted.

### B. Accreditation

[Name of organization] is accredited by CARF/COA/Canadian Council on Accreditation. As a Coordinator/Manager, you are responsible for staying up to date on the standards that apply to Home Share/Shared Living as well as all overarching standards that guide organization practices. Our accrediting body frequently reviews and updates the standards that apply to our program. It is your responsibility to stay up to date on the most current version of the accreditation standards.

Why are we accredited?



Creating a culture of continuous learning and service improvement on behalf of the individuals we serve



[Name of organization] is committed to the accreditation process because we value the many ways in which these best practice standards helps us to maintain and consistently improve our practices.

#### How this Manual Fits with Accreditation

This manual has been designed to meet and/or exceed our accreditation standards. By ensuring you consistently follow the practices outlined, you will be in a good position to confidently present our program during our accreditation site visit and/or to prepare required evidence of conformance to the standards.

If you have not had the opportunity to be part of preparing for or hosting visits from our accreditors, be sure to talk to [designated leader] about the best ways for you to be part of preparing for our next accreditation site visit.

### 

### C. Funder Relationships

Our funders are integral to the success of our services. It is important that each of us in our Home Share Program develop positive working relationships with our CLBC facilitators and analysts or other funder representatives in order to support each individual and Home Share Provider. Part of building positive relationships is being clear about the role CLBC or other funders play in relation to our program and your work. In many ways, CLBC or other funders play much the same role in relation to our services as you do in relation to our Home Share providers:

As a contracted service provider with CLBC or other funder, [Name of Organization] manages all our own internal systems including supporting and supervising you in your role. It is important that you take direction from your [designated leader] and that, if you are unsure of any aspect of your role and/or before responding to any input or requests made of you from CLBC or other funders, you seek guidance from this [designated leader].

CLBC/ Other Funders

* Refers eligible individuals to our services
* Makes funding allocation decisions for each individual
* Contracts with us for delivery of Home Share services
* Monitors that we are meeting our contractual obligations
* Oversees the care of each individual in a home share arrangement with us (check-ins with the individual, monitoring incidents, conducting investigations if needed, adjusting funding allocation / making service decisions if care needs change etc.)

We make decisions and keep them informed about whether we can serve the individual & we let them know if and when we have confirmed a Home Share arrangement

We need to make sure we are meeting all contractual obligations within our internal practices & participate fully in service monitoring

We need to

⏵keep them informed about any changes, issues arising or concerns about the individual and/or their care ⏵ensure all incident reporting is completed according to our protocols ⏵participate fully in any investigations

Your job is to follow through on all our protocols and practices to ensure that CLBC has the information they need to monitor and support our services.

### D. CLBC Standards for the Coordination of Shared Living

CLBC is in the process of developing new standards for the Coordination of Shared Living that they will use to monitor our services. These standards will be rolled out in 2021-22 and will form part of terms and conditions of our contractual agreement with CLBC going forward. A revised monitoring framework and practice will also be developed that will be reflected in the conversations you have with CLBC regarding our practices and coordination role.

These standards are aligned with accreditation standards. Because we are accredited under the CARF/COA/Canadian Council on Accreditation standards and demonstrate conformance to these standards, our practices should meet these new standards as long as we maintain consistency.

Part of your role, as a Coordinator/Manager will be to review and maintain familiarity with these standards and how our practices demonstrate conformance with them.

### E. Community Resources/Systems

An important part of your role is to help each Home Share Provider and individual find the resources and supports they need to build their lives together and respond to new and emerging needs. This function involves:

***Directory of Resources***

Name of Organization maintains a directory of local and external resources that you can access and build on. Be sure to add the names and contact information you uncover as you learn about new resources (along with any tips about best ways to connect). As a Coordinator/Manager, it is important that you contribute to this resource so that it remains a relevant and up to date resource that everyone can access.

* Sourcing available community, regional, and provincial government, health, and community services/social supports.
* Determining the best method of keeping up-to-date listings of these services including names, contact information and relevant access details.
* Supporting home share providers and individuals in their efforts to access relevant services.

***Tips for Finding New Resources***

* Ask your existing connections for referrals
* Check in with your professional networks (BCCEO Network, Inclusion BC etc.)
* Consult with other organizations/colleagues
* Engage your team and/or the team surrounding an individual to do a ***community mapping exercise*** (mapping local resources they use)
* Make contact with local citizen’s groups, MLA and MP offices, service clubs to find out what they offer and/or to explore links they might have to specific resources/supports you are seeking
* SHARE, SHARE, SHARE – get in the habit of sharing contacts and information/resources you gather so it is not all held by you. This gets in the way of good service to the people we support!!! If you leave, so does this knowledge.

The following is a sampling of the kinds of links you may be called upon to make:

* Information/resources about specific conditions such as:
  + Dementia/Alzheimer’s
  + FASD
  + Autism
  + Down Syndrome
  + Eating disorders
* Health and Wellness resources such as:
  + Sexual Health
  + Depression/Anxiety
  + Anger Management
  + Healthy Eating
  + Aging Supports
* Employment
  + Employment Support Programs
  + Vocational Programs
  + Labour Standards
  + WorkSafe BC
* Financial resources such as:
  + Banking options
  + Savings options such as Registered Disability Savings Plans (RDSP)
  + Scam prevention
  + Budgeting supports
  + Financial Aid programs
  + CPP and Old Age Pensions
* Legal Resources
  + Legal Aid/Poverty Law Advocates
  + Restorative Justice Programs
  + Representation Agreements
  + Wills and End of Life Planning
* Resources/Supports to Navigate Systems
  + Health Services for Community Living
  + CLBC
  + Health and Mental Health Authorities
  + College/Education Systems

Take time to familiarize yourself with the existing directory and be sure to maintain and consistently build new connections with resources both within our community and those that are accessible regionally, provincially, and nationally. This network of contacts and your role in staying on top of and making appropriate linkages is critical to the success of the home share arrangements you create. Be sure to make this focus a priority.

#### Community Mapping

Do you want to know more about community mapping? There are some great resources to help you create your own local community map. These are just a sampling to get you started:

* <https://buildingcaringcommunities.ca/community-asset-mapping/>
* <https://static1.squarespace.com/static/5a54f5a7f09ca43eb4829c08/t/5b56647c2b6a282123af552f/1532388478958/ABCD-0-Overview.pdf>
* <https://www.bccommunityassetmapping.com/who-we-are>

## 2. Approaches to Measuring Performance

### A. Quality of Life Indicators

The Quality of Life Indicators used by CLBC are an important tool for helping us measure our effectiveness in supporting the quality of life for individuals we support in each of our home share arrangements. Our contractual responsibilities in the terms and agreements of our funding with CLBC require that we are able to confirm that individual planning incorporates the Quality of Life domains for the persons served in these settings. These same expectations are also part of the contractual agreement with our home share providers.

#### Quality of Life Framework developed by Schalock, Verdugo, Gomez, & Reinders, 2016

| *Quality of Life Domain* | *Exemplary Indicators* |
| --- | --- |
| Personal Development | -Education status  -Personal competency (cognitive, social, practical) |
| Self-Determination | -Autonomy/personal control  -Choices |
| Interpersonal Relations | -Interactions (e.g., social networks)  -Relationship (e.g. family, friends, peers) |
| Social Inclusion | -Community integration  -Community roles |
| Rights | -Human (respect, dignity, equality)  -Legal (citizenship, access, due process |
| Emotional Well-Being | -Contentment (satisfaction, enjoyment)  -Lack of stress (predictability and control) |
| Physical Well-Being | -Health status  -Activities of daily living (self-care, mobility) |
| Material Well-Being | -Employment status  -Personal possessions |

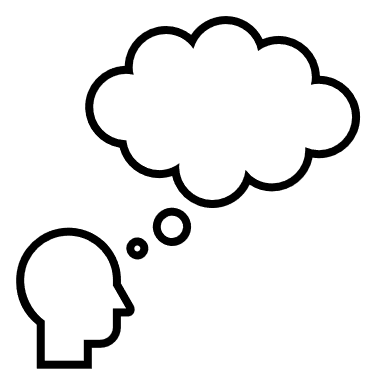
#### How Can We Use This Framework to Measure Our Performance?

a) Quality of Life Reports:

Our Quality of Life Report provides a template for thinking through and providing qualitative information (stories, lists of activities, strategic support offered etc.) about each individual’s experiences in each of the domains. It is important for you to help each Home Share Provider to think about the individual by using these domains to reflect on the activities they support. Don’t just leave it to chance and hope they can fill in the blanks. Engage them in understanding and thinking about these domains. Not only does this process help you both to acknowledge areas where the individual has a lot of examples of activities supporting a particular domain i.e., lots of involvement with family and friends, it also helps to pinpoint areas where more support/attention may be needed i.e., limited social inclusion in the form of community engagement.

What’s Happening for Joe?

*How is Joe exercising independence and control in his life?*

*What could I do differently to support him more in this area?*

This type of exercise, done collaboratively with the provider, offers a comfortable way to pay attention to quality of life and can naturally lead to brainstorming ways to develop new opportunities for individuals to increase their quality of life in key domains.

b) Check-ins with Individuals

During monitoring visits or on separate occasions, taking time to explore what’s happening for individuals using the domains as a guide, can help to focus conversations so you get a better understanding about the quality of their lives. Choosing one or two domains for each check-in makes it easier to explore each domain more deeply and lends itself to a more informal discussion than trying to cover all domains in one sitting. Just be sure to cover all domains at least once each year and make note of them in the individual’s [contact log] along with any suggested action plan or planned follow up arising from these discussions. Be sure to check back to see if actions taken have the impact intended and make note of these results as well.

c) Annual Satisfaction Surveys for Individuals

Each year we ask individuals to give us feedback on our services. We link our questions to the quality of life domains. This format allows us to gather some quantitative data that can help us understand general trends among the individual’s we support in relation to their quality of life. We use this feedback to help guide all members of our team in thinking through domains where we could be offering more support to all providers/individuals and/or developing more resources.

We also amalgamate the data from these surveys , analyze it and then use it to set performance outcomes for the service for the coming year. In some cases, we may also convene a focus group of self-advocates to discuss an area in more depth to better understand their experience and take action to improve our performance based on the dialogue that occurs.

Part of your job is in prompting individuals to take the time to complete these surveys by:

* letting them know how important this information is for guiding their services
* reassuring them that their responses are anonymous so they can feel free to share their experiences without worrying about how it might affect others or their services.

### B. Program Performance Targets

While many of our efforts towards performance improvement are focussed on each individual and improving/enhancing their experiences, we also take time to step back and pay attention to overall program performance. We gather information that helps us understand how we measure up in terms of our effectiveness, efficiency, service accessibility, and service experiences.

Add a link to your performance targets here or insert/attach for easy reference

As a coordinator/manager, you are responsible for participating in all aspects of our program performance and improvement activities from helping us to set our targets, through complete and accurate data collection, to analysis, action planning and follow through. The chart below shows this cycle

## 3. Records Reviews

Records reviews are an important tool we use for monitoring our performance. Not only does it help us to support you in maintaining up to date and accurate records that reflect quality services, but it also helps us to explore, and problem solve issues or barriers specific to the Individual/Provider or to our systems that are impacting your capacity to meet expected timelines or follow through on our service standards and policies. Our focus is on supporting your learning and growth so that individuals and providers are well supported and monitored. Follow up with you regarding any findings from all records reviews are intended to celebrate your strengths, foster improvements in practices, and address identified issues or barriers.

### A. Records Review Process

[Name of Organization] conducts routine records reviews using the following system. Each [time period],

* A sampling of \_\_\_\_% of the records of all individuals served and their providers are randomly selected by the [designated leader],
* The selected records are reviewed by [members of the team or name specific positions] who have been trained in records review processes and requirements. No team member can review their own records.
* Results of records reviews are documented using our standardized records review checklist and discussed with the coordinator/manager responsible for the record to provide constructive feedback.
* Any follow up action required to address findings from the review are assigned back to the coordinator/manager for completion.
* Status of records reviews remain ‘in progress’ until all identified actions have been completed and the review is signed off by the [designated leader].

### B. Areas of Focus in Our Records Reviews

When reviewing our Home Share Records, the reviewer is expected to review both the Individual’s complete record and the Provider’s complete record. An overview of the areas of focus is provided in the chart below.

Add link or attach a copy of your standardized records review checklist here

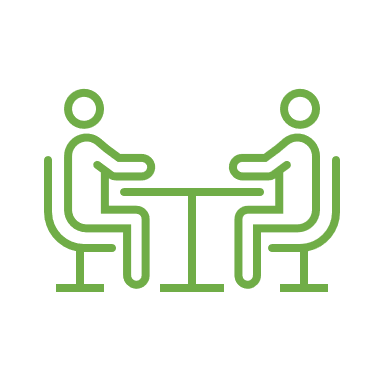
## 4. Supervision Sessions for Home Share Coordinators/Managers

### A. What are Supervision Sessions?

Supervision sessions provide you and your [designated leader] with regular opportunities to come together to support your practice. They are scheduled sessions using a structured format that includes:

* **An opportunity to check in with you** – providing you with the time and space to reflect on how you are feeling about your work and what you may need right now in terms of coaching and support from your [designated leader].
* **Time to address any follow up from last session** – engaging in a review of any actions taken by you or your [designated leader] and whether they happened and had the intended impact.
* **Focussed time to review your caseload** – ensuring that this review includes more than just the most challenging or demanding on your caseload. This practice helps to provide a more balanced review of what is working and areas where you may need more support i.e., learning more about community resources to support an Individual or a Provider, and/or where you may want to give more attention i.e., a stable home share arrangement that seems to be going well but may be enhanced by more direct support/coaching regarding a specific Quality of Life domain
* **Time for other agenda items** – leaving some time to address any urgent agency or other updates that require in person discussion/clarification. Where possible, we like to limit topics discussed here to only those that cannot be addressed through regular communication channels. We want to focus attention on your development and not agency business.
* **Time to explore any training or development needs you might have** – If these have not come up specifically in the other areas covered, your [designated leader] will take time with you to discuss next steps in terms of your development in your role.

### B. Why are Supervision Sessions Important?

We value you and your contribution as a Home Share Coordinator/Manager and understand the many demands you have on your time because of the complex nature of your role. For the most part, you are expected to work independently while assuming a high degree of responsibility for the lives of the individuals you have placed in the care of Home Share Providers. This work arrangement calls on you to be self-directed while also consistently seeking consultation and feedback from leadership and/or other members of your team.

Supervision sessions play a key role in supporting you in the complexities of your work, so you do not feel alone, and you have the consultation and feedback you need to be successful in your role. Sessions are designed so they:

* Allow your [designated leader] to get to know you and to learn about how to best support you.
* Help you to feel acknowledged and supported in all aspects of your work.
* Offer you an opportunity to receive feedback about your work
* Provide opportunities for you to explore both the content (what is happening) and the process (how it is happening) so that the emotional, physical, spiritual, and intellectual demands of this work are recognized and addressed.
* Provide you with a safe place for discussion so that you can share openly about the issues or concerns you are experiencing with a focus on learning and growth.
* Involve collaboration with your [designated leader] so you gain from their knowledge, skills, and experience.
* Use a reflective practice approach that helps you to take a step back from an issue to better understand and analyze situations/issues raised before shifting to problem solving and action planning.
* Result in clear goals and action steps to take forward and integrate into practice.

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### C. How to Make the Most of Your Supervision Sessions?

In order to make the most of your scheduled supervision sessions, we offer the following tips:

* **Give these sessions priority** – There are always things that will come up that can seem more important than time spent supporting your work and your development in your role. Avoid falling into this trap. Make cancellations the exception and be sure to rebook if you absolutely can’t find a way to avoid cancelling a scheduled session. Your [designated leader] will do the same.
* **Take time to prepare** –
  + Have notes from previous session ready to review during the session and be prepared to talk about any action taken and results.
  + Jot down any issues you want to address, guidance you need, or other details so you can add to the agenda.
  + Be prepared to give a synopsis of the selected caseload for the session. These will be the focus of discussion.



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* + Take note of your emotional state. Be prepared to talk about what is going on for you emotionally regardless of whether you see these feelings as positive or negative.
* **Be open and honest about what is going on for you** – Although you might feel inclined to dismiss uncomfortable feelings in favour of putting on a good front, you will get less from your session by ignoring what is comping up for you. Naming it can help identify areas where it is likely important to place some attention i.e. *I’m feeling flustered right now. All I can think about is how much I still have left to do today*. This self-observation provides a cue to your [designated leader] about possible workload issues that they can then start to explore with you.
* **Be curious and invite feedback** **in areas where you want support**– This is your opportunity to learn from others and to gain some perspective on your work. Remember the focus here is not on finding ‘fault’ with your work but in providing guidance and support. You are not alone in many of the issues you face. Ask questions, raise your fears, talk about what worries you. You will be surprised how these will likely resonate with your [designated leader] who may be able to provide some practical tips based on their own similar experiences!
* **Take time to celebrate and acknowledge your successes** - We can learn as much from what is going well as what is not. Don’t forget to reflect on the positive experiences and your learning from them.
* **Make sure to leave with 1 or 2 action steps you can work on** **to improve your practice**- Always make a plan. Great conversations might only ever be just great conversations that feel good but may have no long term impact without a plan. Setting some specific action steps to help you improve your practice, helps ensure that all the ideas and suggestions discussed aren’t lost in the busy day to day of your work. Pick one or two ideas to work on and write them down to share with your [designated leader] so you have a ‘witness’. Next time you meet, you can check in together to consider any impact on your practice. Note: These action steps are specific to your personal practice and will be in addition to any specific action items you might have developed to support someone on your caseload.

D. How do Supervision Sessions Support My Career Development?

Finally, part of the function of our supervision sessions is to support your on-going development in your role, ensure your required credentials are up to date, and that your training needs are identified, and action plans developed to address these. At [Name of organization], we use our regular supervision sessions as a way to support you in your ongoing development rather than limiting feedback opportunities to our annual performance reviews and/or when issues arise. This means that you have the opportunity to gain valuable feedback throughout the year, think through your practice including your areas of strength and the areas that are more challenging for you, and take measures to address those challenging areas. These sessions throughout the year then lead to a comprehensive annual performance review that reflects and guides your practice that forms part of your personnel records.

## 5. Program Reviews and Follow-up

### A. Types of Reviews

As outlined earlier, we can expect the following types of program reviews to help us understand how we are doing in providing quality services. These include:

* **Our Annual Program Performance Reviews** – These internal reviews provide us with a snapshot of our performance in key areas so that we have a better understanding of trends in our performance over time and how, if at all, actions we have taken have helped to improve our performance. Our annual performance review relies on data you and all members of our team have documented throughout the course of each year about the services we deliver (who we serve, how we serve them, how well and how efficiently we have met their goals/expectations, levels of satisfaction with services etc.). This review is presented in a statistical format that helps us to see the program as a whole and the impact it has in relation to our service mandate.

*Last year we:*

* *Developed 5 new Home share arrangements*
* *Saw 2 home share arrangements end – 1 Home Share provider retired, the other moved out of our area with the individual*
* *Supported a total of 55 Home Share arrangements*

*Some Important Numbers*

*95% of our Home Share arrangements have lasted 2 years or more – we make good matches!*

*Our average time to develop a good match this year was 3 months – this is up by 10% from last year – COVID may have been a factor*

You may find that the statistics we gather as part of this review are helpful in your work. For example, statistics about the average length of time an individual seeking a home share arrangement may have to wait before successfully finding a home share provider match can be very helpful when talking with new applicants to our service.

* **Monitoring Visits by Our Funder** – This external review involves both a documentation review and discussions with members of our team. In some cases, it may also involve interviews with the people we serve and Home Share Providers. You may or may not be directly involved in the review itself. However, some of your records and people on your caseload will likely be included in the review depending on the sampling methods used by the reviewer.

Monitoring visits are usually conducted once/year and notice for these reviews is often quite short. This means it is important for you to consistently keep your records up to date and to follow through on all practices and procedures. In situations where a practice or procedure has not been followed, your notes should provide a clear explanation of the rationale for this variation from procedure. Remember that each record should be able to tell a clear, objective story about your engagement with and the experiences of both the Individual and of the Home Share Provider. These stories are especially important when someone external to our services is reviewing our records. Be sure your records reflect our due diligence in telling these stories.

Yet another reminder about why it is important for you to keep your records up to date



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Our Funders have a standardized template they use that guides their review. This template reflects our contractual agreement with them and all program standards they reference in our contract. The soon-to-be-released *CLBC Standards for the Coordination of Shared Living,* will be used in CLBC monitoring visits/program reviews in the future.

If you are asked to be part of a review, make it a positive learning experience for yourself:

* + Share your enthusiasm for [Name of Organization] and our services.
  + Point out the things you are proud of or share stories examples of practices in action that you find particularly impressive.
  + Ask for clarification if they ask you a question you don’t understand.
  + Be honest – If you don’t know about a practice, say so and refer the person to someone who does.
  + Tap into their expertise – ask questions, learn from them.

Monitoring visits by our funders provide us with valuable insights about how the funder views our services and what, if any concerns they have, with the quality of our services. We want to learn from them so we can improve our services.

* **Accreditation Site Visits and Documentation Reviews** – This external review usually happens once every # of years. An accreditation team will visit our organization. One member of the team will typically be assigned to review our program. This person will be looking to see and experience the following:

|  |  |
| --- | --- |
| The Written Stuff  🡻  What We Say We Do | Our Policies, This Handbook/Manual, Our Participant Handbook, Our Contractor’s Guide etc. |
| The Written Stuff  🡻  What We Actually Do | Evidence in our records that we follow our policies and procedures – Do our records match the level of detail, timelines, and other practice standards we say we have?  Can we show them our recruitment plan? Can we show them a completed home study? Do our files tell the story about how we made a match for an individual and that the individual had choices? etc. |
| Observations  🡻  Policies and Procedures in Action | Tour of some Home Share arrangements to see that the procedures we say we follow are being practiced in the homes and in the planning with individuals. |
| Conversations  🡻  Confirmation of Experience that these Procedures Happen | Private discussions with Home Share Coordinators/Managers, Home Share Providers, Individuals,  to confirm that standards are bring followed. |

The Accreditors also want to know about our strengths and the things we feel proud about in relation to our program. They will make sure to highlight these in their report so it is important to make sure we share these.

### B. Follow up to Reviews

Your designated leader is responsible for overseeing any action plans arising out of any of our internal or external reviews. You may be assigned specific activities to complete. Be sure you understand what you are expected to do including the specific task, timeline, outcomes expected and who/how to report completion. In most cases, the expectation will be that you:

* complete the task and report back that it has been completed.

or

* ensure you have incorporated the required change into your practice and that you can demonstrate this to your designated leader.

Improving Our Performance through Teamwork!

## Chapter 8 - Q and A Your Role in Quality Monitoring & Continuous Quality Improvement

There is so much paperwork to track for each Provider. How do I keep track of it all?

**Use a Schedule:** All paperwork and timelines for renewal for each provider should be listed on our

[Form you use to track contractor requirements]. Make sure this is up to date and that you can set up a system for e-mail or electronic reminders that prompt you at least 30 days in advance of any due dates. This gives you time to remind the provider. (On electronic systems, this can be a filtered view or email reminders or a flag on a dashboard – whichever works best for you.)

**Create a Weekly Routine**: Slot time each week in your schedule for paperwork tracking. Use this time to review and follow up with all providers about the paperwork that is due. Track these contacts so you have a record of sending this reminder and schedule a new date for follow-up. That way you can track your progress! NOTE: It can be easy to fill spots in our schedule that are ear marked for paperwork. You will need to hold these spots the same as you do scheduled appointments. If you find that something more pressing forces you to use a paperwork time, do not cross it out, move it to an open spot and hold this new spot.

**Engage Providers**: Use a checklist that Providers complete when they submit their invoices to you that has them track their own paperwork. This may not work for all providers but some may find this simpler and eliminate this task for you.

**Consult with Other Team Members**: They may have simple systems that you can adopt or adapt for yourself.

**If You Are Struggling to Keep Up, Alert your Designated Leader Immediately:** Don’t wait to get ‘caught’. If you are struggling and know you are not keeping up, talk with your designated leader about what you can do to address this issue. It is important that they know and can take measures to deal with this issue as it can have serious repercussions for the Individuals involved as well as the [Name of Organization]’s contractual obligations.

What if I consistently struggle to keep up with all the documentation I have to do?

**Address it with your designated leader ASAP**: You are accountable to meet the documentation timelines [Name of Organization] has specified. If you are not able to meet these timelines and information is missing from the records, we are not meeting our contractual obligations and undermining services to the individual and provider. Your designated leader needs to know so they can take corrective measures. They will create an action plan with you which may include some of the following:

* Consult with identified team members who manage their documentation well to learn their tips
* Review documentation completed by these team members to see the types of notes they write
* Set clear times on your schedule for writing notes/completing forms/entering data
* Build time into each appointment on your schedule to complete required documentation
* Get permission to and follow required procedures to set up to enter notes electronically from your phone when on the road
* Open your contact log before each phone call, email, text you send. Copy and paste into the log if the contact is digital and/or make notes as you converse with the individual
* Use a tablet or laptop to document your notes during monitoring sessions with permission of the provider and individual – most people are used to and do not find this intrusive.

**Try a Different Approach:** The terms used in the Quality of Life Domains can seem very bureaucratic and like an ‘add on’ to expectations that the Provider feels are unwarranted. Instead of leading with a list of the domains, use the framework to guide your conversation with them so you can gain insight into the ways many of these domains may already be being supported in the home. Don’t make it a chore, make it about what’s happening now. Acknowledge and encourage these and make sure they are noted in the Quality of Life Report so the Provider starts to understand how we use them.

**Problem Solve if Report Writing is Getting in the Way**: Some providers may be resistant to writing a report and it may not be about the domains at all. If you expect them to write the report and see this as part of their role, talk to them about this expectation and how we can support them to meet it. There are lots of examples in Chapter 4B of this handbook, D. Gaining Commitment for Documentation and Reporting

**Coach them with Examples of Activities in Each Domain**: If they struggle with what to write under each domain, spend time with them as above, learning about what is happening in the daily life of the individual and add these to the various sections of the report. Using real life examples of things that are happening in their household helps bring meaning to what might appear like abstract terms to them i.e., *Autonomy/ Personal Control – Joe makes his own schedule about when he gets up in the morning to go to work and when he goes to sleep. Sometimes this means he is late for work. We talk about the importance of getting to bed early on work nights but we don’t enforce any bedtimes or nag him if he isn’t getting up. He’ll learn.*

**Pay Attention to the Individual’s Feedback about their Quality of Life**: Make sure you focus on the Individual. They are your barometer to help you determine if this apparent resistance by the Provider is more to do with your relationship with them than a flag about care for the individual. Be sure to consult consistently with the individual about their experiences using the Quality of Life Framework to guide your questions. This may be a non-issue or, if there are flags that suggest the individual’s quality of life or rights may be compromised, you will need to consult with your [designated leader] to decide next steps.

Explore the Role of their Contractual Agreement with Them in More Detail: There may be times that you find the need to call the Home Share Provider’s attention to their contractual obligations. In consultation with [your designated leader] you may choose to reference the clause in the contract about providing the HSP with a written notice of correction, giving them 30 days to rectify the issue. For some, setting up a system where completion of these requirements triggers their payment may also assist them to recognize the importance of these records. These strategies should only be used as a last resort when all other approaches have failed to address the issue.

What if a Provider expresses resistance to putting in any effort to support

the Quality of Life Domains for an individual?

**Clarify your understanding of the feedback:** Before jumping to conclusions, be sure to check in with your [designated supervisor] to fully understand what they are trying to tell you. Using statements like*, I am not sure what you mean when you say….* or *I am confused. It was my understanding that…..* or *I am not clear how this does not meet the standard*…..can help set a neutral tone to your questioning that can invite further clarification. Remember that your supervisor doesn’t always have all the answers either but by working together you can find a comfortable path through any situation.

**Listen with an Open Mind**: Be open to what they have to say in response to your quest for clarification. It may be difficult if you are feeling particularly vulnerable or defensive about the area in question. However, it is important to stay attuned to learning which means staying focussed on hearing their perspective without jumping in to defend yourself. The focus of supervision sessions are to support you in your role. Listen with this understanding. Is there something you need to learn here?

**State Your Case**: If after further clarification, you are still not satisfied that the feedback is warranted, state your concern and the rationale for it. Try to be as neutral and respectful as possible in your approach i.e., *I am not sure I agree with you. I feel that I am meeting this standard [name the standard] in the following ways. Is there something I am missing that could help me better understand?* Again, it will be your responsibility to listen with an open mind to better understand the intent and focus of the feedback. You might also ask to have a broader discussion with the team to look at other available options. Keep the person's best interests at the centre of the discussion - this is not personal.

**Determine next steps**: If you are still feeling dissatisfied with the explanations provided and the feedback has not been revised or retracted, tell your [designated supervisor] that you are in disagreement and do not feel comfortable with the recommended actions. Ask that this be noted on the session notes and clarify how this might impact your next performance review and future with the program. Based on their feedback, determine next steps. You have the right to seek advice from your union or employee representative.

What if I don’t agree with the feedback my [designated leader] gives me during my supervision session?

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

   supporting them. [↑](#footnote-ref-1)