

CPASS HAWAII

Demonstration Project



Community Support Guide Orientation

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CPASS Hawaii

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ALOHA

Welcome to the CPASS Demonstration Project. You have been selected to provide a very important support service for a self-advocate in the CPASS project. We hope your participation will be satisfying and rewarding. You are now a part of a statewide demonstration project to help us all learn more about how to provide services to help people with developmental disabilities realize or live their dreams.

The Community Support Guide (CSG) is a brand new support role in our State system. This support has been shown to be very important for individuals using consumer directed systems. Other states have been using similar support services with different names such as: *Community Access Coach, Community Specialist, and Support Service Brokers*. Medicaid often refers to this as “Support Brokerage” service.

Some of the things the CPASS Councils believe the CSG should do for self-advocates include:

- ✓ **Listening to the self-advocate’s goals and expectations**
- ✓ **Helping them achieve one or more of their goals**
- ✓ **Increasing their personal network**
- ✓ **Building relationships and meeting people who may be able to help**
- ✓ **Finding resources in the community that can help them with their goal**
- ✓ **Being creative and developing resources when they need it and find funding when needed**

Just as each person’s goals are different, the supports each person will need to accomplish their goals are also very different. The CSG cannot duplicate any other services already provided by the Medicaid Waiver. The CSG is different from a Case Manager or a Personal Assistant (PA). The CPASS project will help us learn more about how CSG’s can help self-advocates, and help provide the Department of Health/ Developmental Disabilities Division (DOH/DDD) with valuable information about this type of service.

We are committed to doing everything possible to help you experience success. We want this project to help everyone. If you experience any problems, or have any concerns about your participation in this demonstration project, we encourage you to contact someone at the CPASS office as soon as possible. CPASS contact information is on the cover of this booklet.

The next sections will orient you to some of the work that has gone in to this development, and give you some tools and suggestions that may help you as you work to support your self-advocate. This orientation will cover:

I. CPASS Background

a. Consumer Directed Services

b. The Demonstration Project & Timeline

c. Demonstration Project Facts

d. CPASS Stakeholders

II. Self-Advocate & Family Handbook

III. Documentation & Invoicing Requirements

IV. Goal Oriented Funds

V. Tips and Suggestions for Getting Started

a. Planning Meeting

b. Listening

c. Ongoing Communication

VI. Sample Worksheets

VII. Importance of Networking

a. Networking Notes

CPASS Background

CPASS Grant

Grant Information

<i>Name of Grantee</i>	State of Hawaii, Department of Health		
<i>Title of Grant</i>	Hawaii Systems Change for Community Living: Community Personal Assistance Services and Supports		
<i>Type of Grant</i>	Community-Integrated Personal Assistance Services and Supports		
<i>Amount of Grant</i>	\$725,000	<i>Year Original Funding Received</i>	2002

Contact Information

David Fray, Chief 808-586-5840 dffray@mail.health.state.hi.us

Developmental Disabilities Division
1250 Punchbowl Street, Room 463
Honolulu, HI 96813

Subcontractor(s)

The Center on Disability Studies at the University of Hawaii is contracted to administer the CPASS grant.

Target Population(s)

Persons (18+) with developmental disabilities

Goals

Involve all stakeholder groups and maximize individual participation in a collaborative community and systems change process through a self advocate individual-majority Advisory Council(s).

To increase the involvement and control of individuals in planning and evaluating personal supports, relationships, and community connections.

Enhance the capacity of individuals to help them make informed choices about how the personal assistance services and supports, specified in their individualized service plans, will be delivered and managed.

Provide training, technical assistance, and information to stakeholders on the attitudes, skills, and knowledge they need to effectively participate in the development and implementation of the project's innovations in a state- wide systems change process.

Enhance the ability of individuals to communicate their visions of a high quality of life as a basis for more effective individualized person-centered planning, and improved quality assurance at the individual consumer systems and community levels.

Activities

Build community connections and improve quality of life measures for persons in the target population at the three demonstration sites through increased utilization of community resources, and the building of relationships and natural support services through community development activities.

Demonstrated through Community Support Brokers ability to build relationships and increase natural supports and other alternatives to paid support services.

Connect resources of the service delivery system with existing targeted community resources to support marginalized persons in achieving quality lives.

Facilitate and support the development of collaborative self advocate majority (51%) State council located on Oahu, and site Advisory Council(s) located in Molokai, East Hawaii and Leeward Oahu, who will guide and make a plan for the sustaining of services regarding training, community assessment, community education, networking, and building of relationships for site participants. Track council participation of individuals with mental health disabilities, neurotrauma and the aging.

Provide an opportunity for the four CPASS councils; located on three islands, to meet (face to face) to share their CPASS related experiences and common vision(s). The meeting will combine sharing of experiences, training, and result in identifying statewide system changes recommendation(s) to the Hawaii State Department of Health's Developmentally Disabled Division. (DOH DDD)

Provide outreach to ensure that all stakeholders and community members involved and interacting with the Community Pass Grant understand the tenets of self-determination and self advocacy.

Support DOH DDD in the implementation of the Consumer Directed Personal Assistance (CDPA) waiver option by providing state wide orientation training and working with the DOH DDD CDPA (Consumer Driven Personal Assistance) training section to ensure training sustainability.

Develop and increase the capacity of leadership by individual service recipients and their families to utilize a consumer driven system and collaboratively guide the project. Provide data, information and assistance for project implementation at the three sites. Institute similar innovations in policies, procedures, and practices within the Department of Health (DOH) system.

Identify and measure quality of life satisfaction of site project participants.

Identify, explore and report system change recommendations that promote Consumer Direction, to the State Department of Health's DDD system.

Implement an outreach and educational information system focusing on Consumer Direction including, but not limited to;

Explore informational systems to emphasize and highlight self determination, consumer direction, as well as DOH DDD program information.

Collaborate with the Hawaii State DD Council to provide families with the latest legislative and project information.

Work with the site councils to develop a CPASS newsletter to share project information among the three CPASS site Councils and State CPASS Council and DOH DDD personnel.

Produce a self determination video / CD that provides information regarding self determination and consumer direction. The video / CD will be made available system wide, to families eligible for services through DOH DDD.

Develop training resource manuals on selected consumer direction topics.

Abstract

The Hawaii Personal Assistance Services and Supports Grant (PASS) will pilot and demonstrate person-directed personal assistance by linking individuals with disabilities to Personal Support Agents/Brokers and explore supports offered by intermediaries. The project will combine best practice methodologies for developing community connections, person-directed planning, community awareness, and the development of social equality. The interventions (trainings) and methodologies will facilitate and build community connections, make available community resources, including the development of sustainable self advocate, parent, identified stakeholder councils (with a self advocate majority 51%) at the three demonstration sites, as well as develop a system of natural supports for participating project self advocates. A self advocate majority state wide CPASS Council will be a resource to the site councils. Just as significantly, this project will identify and customize tools to assess the impact of self directed services. Individual participants will take part in surveys both before and after participation in the demonstration project. A self advocate majority state wide CPASS Council will be a resource to the site councils. The project will lay a framework and make recommendations for a systems change.

Consumer Directed Services

Consumer directed services, are also known as self-directed services, or participant directed services. This philosophy of service delivery is where the CPASS project has originated. The basic philosophy allows individuals with disabilities substantial choice and control over the planning and delivery of their support services including who provides their services and how those services are provided. To learn more about this growing movement check out some of the websites below.

The Center for Medicare and Medicaid Services

www.cms.hhs.gov

The Administration on Developmental Disabilities

<http://www.acf.dhhs.gov/programs/add/index.htm>

The Center for Self-Determination

<http://www.self-determination.com/>

National Council on Aging

<http://www.consumerdirection.org/>

Independent Living Research Utilization

<http://www.ilru.org/>

Clearing House for the Community Living Exchange

<http://www.hcbs.org/>

Roberts Wood Johnson Cash & Counseling

<http://www.cashandcounseling.org/about>

ADAPT

<http://www.adapt.org/>

ACT -Advocating Change Together

<http://www.selfadvocacy.org/index.htm>

The Demonstration Project & Timeline

The CPASS Demonstration Project has five primary phases.

Phase 1. The project began when site councils selected individual self-advocates to participate in the project. These participants then attended monthly training sessions where they learned about:

- a. the CPASS project,
- b. getting started on identifying their goals and supports,
- c. making a plan to accomplish their goals, and
- d. the ISP meeting and choosing their goal.

Phase 2. Next participants attended training to learn about Community Support Guide services and to plan a strategy for their goal. Training sessions included:

- a. learning about a Community Support Guide (CSG),
- b. finding and contracting a CSG, and
- c. learning how to work with their CSG.

Phase 3. The third phase of the project involves Community Support Guides (CSG). This period involves meeting, planning, and working with the CSG for a period of time to accomplish the goal chosen by the participant. During this time participants and CSG's will be:

- a. communicating with each other,
- b. updating CPASS and the Councils on the process,
- c. following up on specific parts of the plan, and
- d. looking for and creating opportunities for their goal.

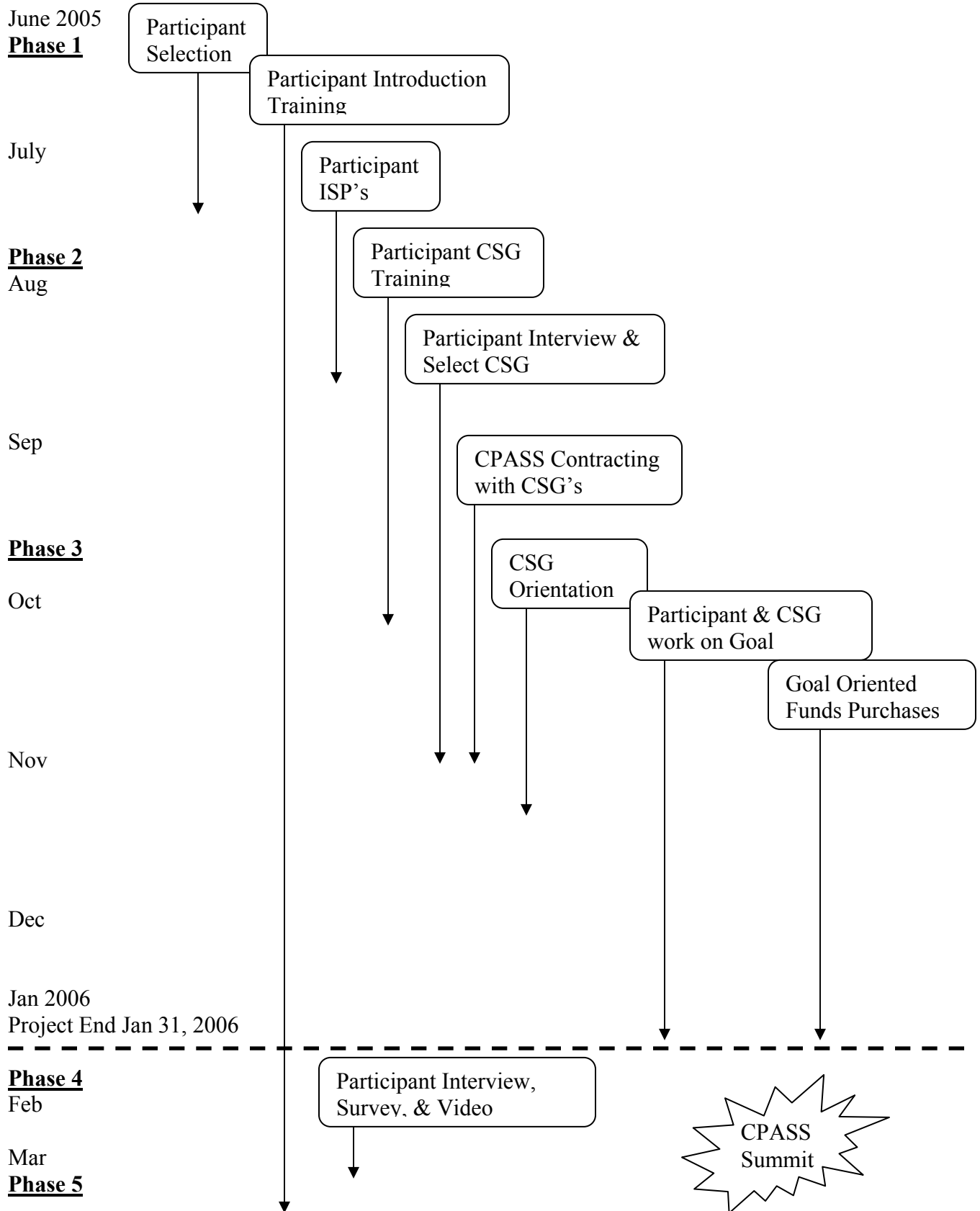
Phase 4. The fourth phase begins when the work of the CSG has been completed or the time period ends. At this time CPASS participants will:

- a. be surveyed on the results of the CSG work,
- b. make decisions on how to use resources found and developed with the CSG, and
- c. CSG's will also be surveyed for their perspective of the project.

Phase 5. The last phase of this project will involve making recommendations to the CPASS Site Council including:

- a. what did and did not work,
- b. what steps to take to sustain and improve efforts to change the system to allow more people to have CSG services, and more choice and control in their services and their lives.

CPASS Demonstration Project Timeline



Demonstration Project Facts

Below are some important facts about the CPASS project. These may answer some questions, and help you understand more about the CPASS grant.

COMMUNITY SUPPORT GUIDES (CSG):

Community Support Guides are a new position for our State system. They are different from a Case Manager or a Personal Assistant (PA). The CPASS project will help us learn more about who should be a CSG, and how this person can help. Some of the things the CPASS Councils believe the CSG should do for self-advocates include:

- ✓ Listening to the self-advocate's goals and expectations
- ✓ Helping them achieve one or more of their goals
- ✓ Increasing their personal network
- ✓ Building relationships and meeting people who may be able to help
- ✓ Finding resources in the community that can help them with their goal
- ✓ Being creative and developing resources when they need it and find funding when needed

CASE MANAGER ROLE:

Case Managers help is a key part of any service system including consumer directed systems and they are a critical support for CPASS participants. It is very important that the Case Manager is informed as to what is happening. They will have valuable suggestions and information to share. It is also important to understand that CSG's and the self advocate need to do the work, not the Case Manager.

INDIVIDUAL BUDGET:

The CPASS grant provides self-advocates who are in the demonstration project with a budget. Part of this budget can be used to hire a Community Support Guide. If needed, part of this budget can also be used to buy other things that will help to meet the goal. *This money cannot be used for anything that Medicaid already provides. (See page 23.)

NO DUPLICATION OF SERVICES:

CPASS funds cannot be used to pay for something that the State or Federal Government is already paying for. Because CPASS is a grant from the Medicaid Program, we cannot use this grant money to pay for things that Medicaid already pays for including Personal Assistance (PA) services, Case Managers, Day Programs, and many other services. In CPASS we have to watch carefully to avoid duplication, and if there are any questions contact the CPASS staff.

FISCAL INTERMEDIARY:

In CPASS, the participants will have control over how their money is spent. The money will be held with a Fiscal Intermediary, which is somewhat like a bank. The University of Hawaii is the Fiscal Intermediary for the CPASS Demonstration Project. In order for the Community Support Guide to get paid, reports and invoices must be submitted to the participant for verification and then forwarded

to the CPASS office. Other purchases can be made by submitting an original invoice for the item or service to purchase.

OUTCOMES/ ACHIEVING RESULTS:

CPASS provides participants a chance to be in control and learn more about making decisions. The experiences will give everyone an opportunity to grow and learn more about themselves. Through the CPASS demonstration project everyone will learn to be a better planner. Dreams and goals may change as participants grow and learn, and their needs change. CPASS supports everyone's right to follow their dreams.

WHAT IS FRAUD?:

FRAUD is when you knowingly lie or cheat to get money, or give someone money who has not earned it. This is a crime!

- This could be lying about the services someone did for you or lying about who is getting paid.
- Submitting false reports or invoices.
- You can get in serious trouble, you could be prosecuted, and you could also have to pay back the money.
- **DON'T RISK IT.** Call the CPASS staff with your questions.

WHAT ARE PARTICIPANT RIGHTS?:

Rights allow you to pursue the best life you can imagine. Participants have all of the rights given to a US citizen. Below are some examples of their rights and how they can be supported:

Safety – The right to be free from abuse and neglect.

Choice – The right to choose, and have choices to choose from.

Relationships – The right to have and seek out relationships.

Contribution & Community – the right to have the opportunity to contribute and participate in your community.

Responsibilities – the right to have responsibility for decisions and actions.

Control – the right to have the power to make decisions and control your services.

Dreaming – the right to have hopes and dreams.

Dignity & Respect – the right to be treated well by others and be treated with kindness with dignity and respect.

CPASS Stakeholders

The CPASS Demonstration Project involves many people, but most importantly it involves PARTICIPANTS. Here is a description of the people that will be involved in the demonstration project and who have worked to make this happen.

1. PARTICIPANT

This is a person with a disability who has been selected to be in the CPASS project. They are participating in trainings, and working on a personal goal in the CPASS Demonstration Project.

2. SELF-ADVOCATE, CONSUMER

Self-advocates are the name used in CPASS for a person who has a disability and is involved in CPASS activities advocating for their needs. Consumers are another name used sometimes which describes a person with a disability who makes purchasing decisions related to their goals and needs.

3. REPRESENTATIVE

This is a person selected by the participant to help them make decisions. They should involve the participant in all decisions. This could be a parent, a relative, a friend, or someone very close who knows them well. Self-advocates are not required to have a representative.

4. YOUR CIRCLE OF SUPPORT

These are all the people who know and help the self-advocate. These are people they interact with regularly, and are already supporting them in different ways. They choose who they want to be in their circle.

5. YOUR CASE MANAGER

This is someone who is assigned to help self-advocates by the Department Of Health/ Developmental Disabilities Division.

6. COMMUNITY SUPPORT GUIDE

This is a person selected and contracted by the participant to work on one or more of their goals. This person has a major role in this demonstration project to help the CPASS participants accomplish their goals, and help everyone learn more about this support service.

7. THE CPASS STATEWIDE ADVISORY COUNCIL

This Council is a resource to the CPASS grant and projects. They develop policies and provide support and assistance to the three CPASS Site Councils. They are made up of all the stakeholders listed on this page with 51% being self-advocates.

8. THE CPASS SITE COUNCILS

These Councils are responsible to oversee and direct this demonstration project in their community. They have the same make-up as the Statewide

Council but are locally based in a target site. They meet on a monthly basis and are there for support. They want you to be successful.

9. THE CPASS STAFF

The CPASS staff works at the University of Hawaii. Their job is to help the CPASS grant run smoothly. You can contact them at any time with questions. They will be supporting you with information and training, including this Handbook. Call (808) 956-5827, or (808) 956-9891. Neighbor Islands can call collect.

10. CENTER ON DISABILITIES STUDIES AT THE UNIVERSITY OF HAWAII

The University of Hawaii administers the CPASS grant. They will act as the fiscal intermediary for this project, and will help direct participant's budget and assist in contracting Community Support Guides. You will not be able to contact the fiscal intermediary directly, but the CPASS staff will assist with this if needed.

11. DEPARTMENT OF HEALTH/ DEVELOPMENTAL DISABILITIES DIVISION

The Department of Health's Developmental Disabilities Division (DOH/DDD) wrote the grant that is making all of this possible. They want to make sure you are safe and successful, and will use the results of this demonstration project to help make the service system better for everyone.

Self-Advocate & Family Handbook

Participants in the CPASS Demonstration Project have spent several months coming to trainings and completing training exercises and worksheets in their Handbook. These exercises have helped them to think about their dreams and goals and make a plan to achieve one or more of their goals. They also learned about the new service called Community Support Guides and made a plan for how to use this service.

It is recommended that you ask the participant you are working with to share their handbook with you. It will help you understand what they have been thinking about and working on and how they made plans for their goals.

Some of the handbook activities are described below.

Identifying Circle of Support

A “circle of support” is a group of people who care about a person and help them. A circle of support should be people who care about the person. The circle can include family, friends, co-workers, neighbors, church members, and can include some service providers or people who are paid to support you.

Some people may not have very many people in their circle of support. Having people for support is a critical part of anyone’s success. Increasing the participant’s circle of support should be every CSG’s goal. There may be people around them that they have not reached out to, or they may just need a little help meeting people.

Identifying Dreams & Goals

Dreams and goals are not the same thing. Dreams are the biggest ideas we have for how we want our life to be. Dreams encourage us to do things that are hard. It is often hard to figure out how we will make a dream come true, but it makes us want to try. It is a vision that steers us in a general direction.

Goals are things we think we can accomplish on a shorter timeline, but maybe are too far ahead to figure out all the details. We can picture goals happening, but we may not be quite sure of all the steps to get there. This is where the CSG’s come in. Some creative thinking and planning may be needed, or support may be required to follow through on a very good plan.

Making An Action Plan

Action planning helps the self-advocate to think about NOW, today. They think about how they can take responsibility and make decisions about what can be done to work on their goals today. The steps are written out on their action plan. It says what needs to be done, who will do it, and when it should be done. Some

of the steps in the participants plan may be unclear or even missing altogether. The CSG should assist them to clarify their plan.

A CSG should help them clarify their plan if there are problems with it. The steps should be easy to understand, and identify who will be doing the work involved. You also need to think about how long it should take and prepare a timeline to help the participant better understand the work involved. A good plan makes it much easier for the participant to keep moving forward.

Writing the Work Description

In this section participants identified the goal or goals that they want to work on with their CSG and made a plan detailing what they want help with. They created a work description for their CSG that becomes the basis for the Service Agreement. This worksheet is designed to help them think about what parts of their plan they need help with and gives the CSG a better idea of what outcome is expected.

They can also begin to think about how much time it will take to accomplish their goal and make some decisions about how their budget will be spent.

Finding Your CSG

This section helps the participants to find a person that best matches their work description. The CSG should be knowledgeable about the person's goal and/or know how to network with people who are. For example, if the participant wants to be a hula dancer, the CSG may need to know about hula or hula schools. If they want to be a cowboy, the CSG may need to know some cowboys, or people who take care of horses and cows.

Helping Your CSG Help You

This section lets them know when they can officially start working, and gives them some tips on getting off to a smooth start. They are encouraged to be open minded as well as openly sharing their ideas with their CSG. They are ultimately responsible and able to make the choice they want, but they are encouraged to listen to their CSG since they are counting on their expertise. The CSG is also encouraged to listen carefully to the participant to hear what they are really saying and what they really want to get out of this process. This section sets the tone for a team that will explore together, but with the ultimate decision making in the hands of the self-advocate.






CPASS HAWAII EVALUATION FORM

Your comments provide us with valuable information that helps us to improve our handbook. Please provide your evaluation and send this to the CPASS project.

CPASS Background & History Self-Advocate & Family Handbook

YOUR NAME: _____

DATE COMPLETED: _____

	Excellent					Poor	N/A
	5	4	3	2	1		
SUBJECT							
Did you learn anything?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was this information understandable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the content good?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the content useful?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the information well organized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How long did it take you review this section? <input type="checkbox"/> 1 hour <input type="checkbox"/> 1-2 hours <input type="checkbox"/> 2-3 hours <input type="checkbox"/> 3-4 hours <input type="checkbox"/> other _____							
Was this too long? <input type="checkbox"/> YES <input type="checkbox"/> NO							
What was most helpful? 							
What was not helpful? 							
What could make this more helpful? 							
What else do you need to know? 							
Comments: 							

Smileys © by <http://www.smiley-faces.com>

Documentation & Invoicing Requirements

The CSG should be helping the self-advocate to increase his or her personal network. They are responsible for documenting this work by making notes of the people they have contacted that may be a support for the participant and giving these contacts to the participant. There is a Contact Notes Sheet (page 20) that should be completed and turned in with each invoice. In addition there is an Outcome Report (page 21 & 22) that documents the status of the person's goal and what outcome has been achieved. This should also be attached with each invoice. There is also a sample invoice for your reference (page 19).

All documentation must be submitted to the participant and their representative for review and verification before submitting to CPASS.

Your Company Name

INVOICE

Street Address
City, ST ZIP Code
Phone 405.555.0190 Fax 405.555.0191

DATE: October 10, 2005
INVOICE # 100
FOR: *Project or service description*
P.O. #

Bill To:
RCUH-Center on Disability Studies
1776 University Ave.UA4-6
Honolulu, HI 96822
Phone: 956-9356
CPASS Project attn: Sandy Shitanishi

DESCRIPTION	AMOUNT
<h1>SAMPLE</h1>	
Goods/Services Received Authorizing Signature DATE:	
TOTAL	\$ -

Make all checks payable to **Your Company Name**
If you have any questions concerning this invoice, contact Name, Phone Number, E-mail

THANK YOU FOR YOUR BUSINESS!

Community Support Guide Contact Notes

CSG: _____

Participant: _____

Participant Goal: _____

***(NOTE DATE AND TYPE OF CONTACT WITH SELF-ADVOCATE AS WELL AS OTHER CONTACTS)**

DATE	CONTACT INFORMATION (Name, Company, Phone, Email, Address)	CONTACT TYPE (Phone, Email, Other)	NOTES/ STATUS/FOLLOW-UP (Indicate results of contact, need for follow-up, completion of action, etc.)

Community Support Guide Outcome Report

Date: _____ Community Support Guide: _____

Reporting Period: From _____ To _____

Self-Advocate: _____

Self-Advocate Goal:

Goal Outcome/Status:

Other Outcomes/Accomplishments:

Unexpected Challenges/ Opportunities:

Other Notes/ Comments:

GOAL ORIENTED FUNDS

Goal Oriented Funds or GO Funds are a part of the participant's CPASS budget that they can use at their discretion to support the CPASS goal they are working on. These purchases should be discussed with their CSG, but the participant makes the final decision on purchases. To access these funds participants need to submit a receipt for anything already purchased, or get an invoice for the amount needed from the vendor or provider and a check will be cut directly to the party on the invoice. There are a few restrictions on the use of these funds and these are listed below.

CPASS DEMONSTRATION FUNDS PARAMETERS

Participants must either have worked with or be currently working with a Community Support Guide (CSG) in order to access Goal Oriented (GO) Funds

Vision Statement:

“Limits on the Use of Public Funds; Ellen Cummings

- (1) The choice shall do no harm;
- (2) The choice shall not be illegal;
- (3) The choice shall not require the congregation with other persons with disabilities”

Three Questions for Guidance:

1. To what extent will this activity promote a lasting improvement in the infrastructure to support consumer-directed, community-integrated personal assistance services and thereby advance the purpose for which these grants were made?
2. To what extent will this personal assistance strategy actively promote the ability of people to live in a community-integrated setting?
3. To what extent will this design of personal assistance services promote the maximum ability of individuals to direct the services upon which they rely?

PROHIBITED AND LIMITED USES OF “GOAL ORIENTED FUNDS”:

Goal Oriented Funds may NOT be used for any of the following:

1. To duplicate any service, support, equipment, etc. already provided by Federal or State support systems, including Medicaid Waiver support services.
2. To be used for expenses that will not primarily benefit individual (self-advocate) participants of the CPASS project.
3. To pay any salaries or wages.
4. Any illegal activities as noted in Hawaii Statutes, including gambling.
5. Airfare/transportation and related costs associated with vacation or holiday travel.
6. Costs associated with any real estate purchase transactions, financial investments, stock or bonds purchases, or personal savings.
7. Costs associated with the purchase of any type of firearms, ammunition or weaponry.
8. Any type of alcoholic beverages or tobacco products.
9. Therapy sessions or associated medical/dental costs.

FUNDING FOR GOALS IS TO BE USED WISELY AND WITH PRUDENCE TO HELP BUILD A POSITIVE FUTURE FOR THE INDIVIDUAL – IT IS AN INVESTMENT IN ONE’S FUTURE.






CPASS HAWAII EVALUATION FORM

Your comments provide us with valuable information that helps us to improve our handbook. Please provide your evaluation and send this to the CPASS project.

Documentation & Invoicing Requirements Goal Oriented Funds

YOUR NAME: _____

DATE COMPLETED: _____

	Excellent					Poor	N/A
	5	4	3	2	1		
SUBJECT							
Did you learn anything?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was this information understandable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the content good?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the content useful?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the information well organized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How long did it take you review this section? <input type="checkbox"/> 1 hour <input type="checkbox"/> 1-2 hours <input type="checkbox"/> 2-3 hours <input type="checkbox"/> 3-4 hours <input type="checkbox"/> other _____							
Was this too long? <input type="checkbox"/> YES <input type="checkbox"/> NO							
What was most helpful? 							
What was not helpful? 							
What could make this more helpful? 							
What else do you need to know? 							
Comments: 							

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Tips & Suggestions to Get Started

As a contractor you have the expertise to support the self-advocate you are assisting to meet his or her goals using whatever strategies you think are best. The information and forms below are tools and suggestions that you may find helpful in your work.

Planning meeting

CPASS participants have been learning about services and planning for their goals in training meetings with CPASS. They have completed some worksheets that help them to think about their dreams and goals and also to help them make a step by step plan to accomplish them. It may be helpful for you to review this process with your participant, and understand how the goal you are helping them with fits into the big picture they have for their life. A meeting like this is often called a Person-Centered Meeting because it focuses on the individual who is receiving the support. At a meeting like this it is helpful to identify all the people who are involved in the participant's life, or their circle of support. A sample of the worksheet they used in the CPASS training is included. (page 29)

It can also be helpful to review the person's dreams and goals in other areas of their life to see if they connect or overlap. A sample worksheet is attached that you may find useful. (page 30)

Finally it is often useful to make a step by step plan for how each goal will be accomplished. The CPASS participants have already done this, but you may find it helpful to review or clarify this with them. A sample worksheet for this type of planning is also attached. (page 32)

Listening

CPASS self-advocates repeatedly share that what they need in their life is people that will listen to them. Often people listening have their own ideas of what needs to be done, and don't hear what the self-advocate is really saying. For example, a self-advocate may talk about wanting to go out and do more things in the community. When you explore that a little deeper, you may find that what they really want is more friends to do things with. That is why listening is such an important skill for CSG's. It is listening to what self-advocates are saying on the surface and hearing what they are really trying to say.

Getting your participant and those around them to share is the first step. Here are some questions that may help you to hear and understand what they are really looking for.

**Who is important to you?
What do you love doing?
What do you dislike doing?
What kind of help do you need to do these things?
What does a good day look like?...bad day?
Where and how do you want to live?
Do you want to work or have money?
How do you get around?
What kind of health or safety concerns do you have? Supports?**

Ongoing Communication

You should be having regular contact and communication with your participant. Most participants are requesting face to face meetings on a regular basis to keep up-to-date and informed on planning and outcomes. You may want to set up a regular time and place for meeting.

Participants have been encouraged to show you their Handbook to help you understand what they are planning and working on. It is important to clarify expectations so everyone is clear what is expected and desired. Participants have also been encouraged to share things about themselves to help things run smoothly. You may also want to share with them things like:

- ✓ Your personal style and preferences**
- ✓ Your schedule and when you are available to talk**
- ✓ Other concerns**

Participants have also been encouraged to do their own listening. They have been encouraged to share openly with you, although they may have some trust issues based on their past experiences. They are also encouraged to be open minded and try new things. Perhaps their usual way of doing things may be limiting them from achieving a different outcome. With your help they may be able to take a different approach and get different results. A positive attitude and a stick-to-it and see-it-through approach should help make a strong successful team. Listen if they have serious concerns or fears, and help them feel safe and comfortable with the strategy you will take together.

SAMPLE WORKSHEETS

Circle of Support Worksheet Instructions

The Box: Person Centered

Write the name of the person you are planning with. Discuss with them who is in the circle and let them decide which circle to put people. Relationships can change from day to day so remember that this is just a snapshot of their circle today.

The First Circle: The Circle of Intimacy

List the people most important to you. (People very close to you or you cannot imagine living without.)
Examples, mom or dad, husband or wife, cousin, etc.

The Second Circle: The Circle of Friendship

List your good friends.

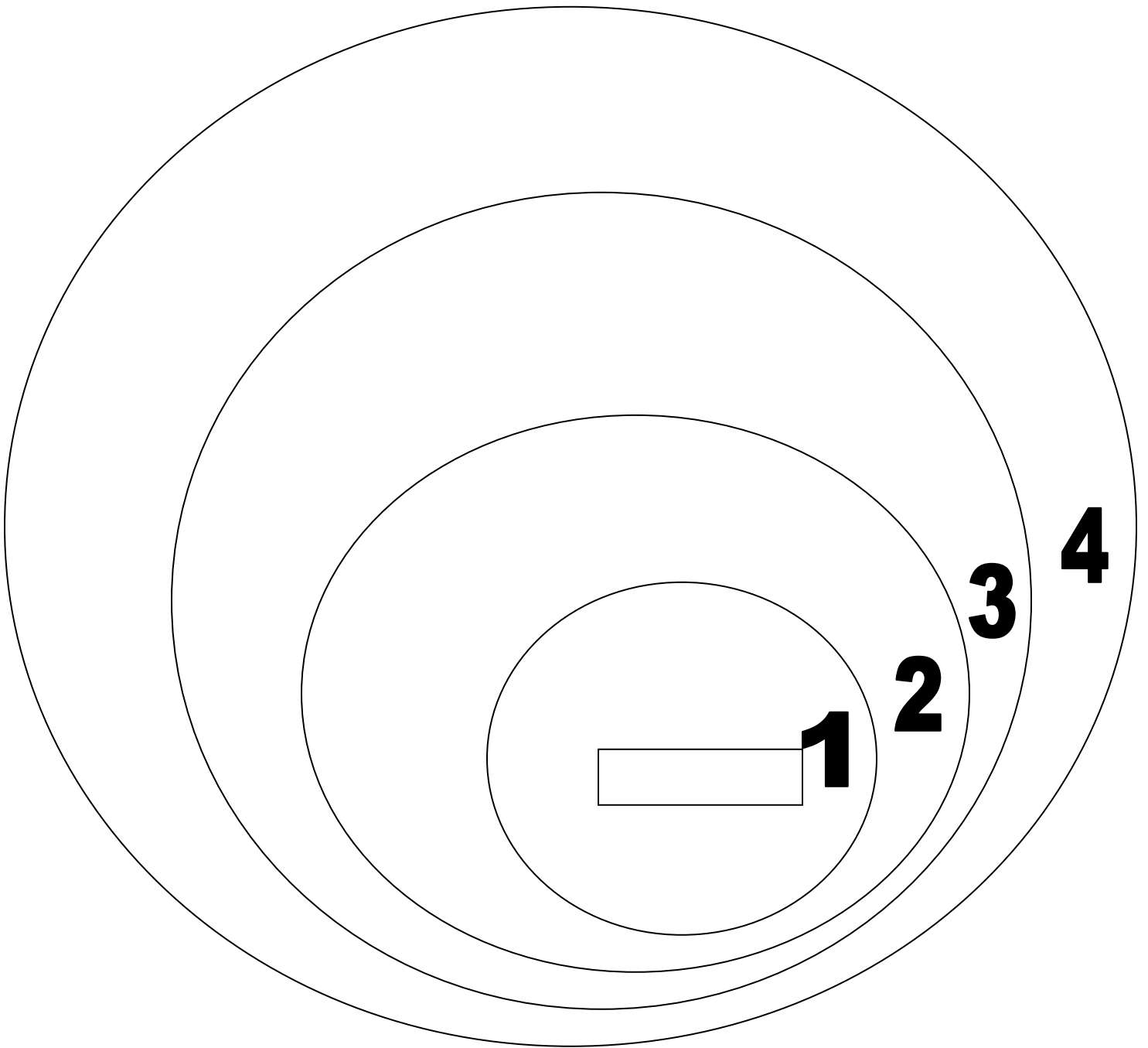
The Third Circle: The Circle of Participation

List people, organizations, clubs, that you participate with or in.
Examples, church, clubs, teams, etc.

The Fourth Circle: The Circle of Exchange

List people you pay to provide services that help you in your life.
Example, case manager, doctor, bus driver, etc.

Circle of Support Worksheet



Dream & Goal Worksheet

1. My Dreams:

2. My Goals:

My Home Living/Life Goals:

My Family Goals:

My Friends/ People I Know/ Relationship Goals:

My Work/Career Goals:

My Recreation/Fun Goals:

My Other Goals:

Action Worksheet Instructions

When you dream, you think about the far off future. When you set goals you think of the future that is not so far off. This worksheet focuses on NOW, today. This is where decisions are made about what can be done to work on your goals today. This is also known as an action plan, and says what needs to be done, who will do it, and when it should be done.

The steps should be easy to understand, and should identify who will be doing the work involved. You also need to think about how long it should take. You can make a time plan, or timeline, so you will know when you plan to finish. The Action Worksheet will help you plan out the steps to start working on your goal. A good plan will make it much easier to get going, and will make it easier for other people to know how to help you.

The worksheet on the next page can help you with this plan

Step 1: Write a goal in the top box.

Step 2: In the first column, list all the steps that you can think of to work toward your goal. List as many as you can think of. (Here's a hint: the first step should start with you doing something.)

Step 3: In the second column, next to each step that needs to be taken, list who will work on that step. Use your Circle of Support Worksheet to make sure you include everyone who can help.

Step 4: In the last column, look at each step that needs to be taken and decide how you will know when each step is finished. What will your life look like, or what will you be doing when that step is finished?

When setting goals it is important to think about what life will be like when you reach your goal. Another name for this is an OUTCOME. If your steps are unclear it may be hard to know when you are finished with a step. You may find that you need more steps or in between steps during this part. It is fine to go back and change steps. This planning will make it easier for everyone to understand the goal, and help clarify what everyone expects to happen.

Action Worksheet

GOAL:		
Steps that need to be taken	Who will do it and When	How will we know when it is done

Importance of Networking

Networking is an important part of meeting anyone's goal. As social creatures we all interact with other people in some way to accomplish our goals. The people we meet may have information that steer us in the right direction, or helps us. Sometimes we need to pay them other times they help us for other reasons. Often our long-term and short-term friends come from these networks.

Self-advocates often have trouble developing these networks for different reasons. As their CSG, one of your responsibilities is to help increase their personal networks by giving them contacts they can call on long after they are finished with your services.

There is no set way to network; you have to do what works for you and for the participant. This may be different for different situations. Networking should be fun and not difficult. It is a process where each person you contact leads to another person, and you never know what you are going to find when you approach that next person.

Networking starts with thinking of all the people you know, and thinking about ways they might be able to help you. You can also think about ways you can share information and ideas, and how you may be able to help them too.

Contacts are the people in your network. Participants will hopefully already have some contacts, but they might not have any related to their current goal. They may not even keep a personal phone or address book. One of the ways you could help them is to help them set this up. The worksheet on the next page may help you develop your participant's network. You should also work with any assistive technology or other tools the individual uses to keep information and help them integrate their contacts into a format that they can use.

The first step is listing who the participant already knows, and then contacting them to find out who they know. When you call them, tell them about the goal and find out what they know and if they know anyone who could help. This network list can included in your action plan and move you toward your goal. This list should be given to the participant at the end of your work so that they are more independent and have some more personal resources of their own.

Networking Notes

People you know	What do they know?	Who do they know?
FAMILY		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
Name:		
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Address:		

Networking Notes

People you know	What do they know?	Who do they know?
FRIENDS		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
Name:		
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Networking Notes

People you know	What do they know?	Who do they know?
NEIGHBORS		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
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Networking Notes

People you know	What do they know?	Who do they know?
PEOPLE FROM WORK		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
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Networking Notes

People you know	What do they know?	Who do they know?
PEOPLE FROM SCHOOL		
Name:		
Phone:		
Email:		
Address:		
Name:		
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Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
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Networking Notes

People you know	What do they know?	Who do they know?
PEOPLE FROM AGENCIES		
Name:		
Phone:		
Email:		
Address:		
Name:		
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Email:		
Address:		
Name:		
Phone:		
Email:		
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Networking Notes

People you know	What do they know?	Who do they know?
PEOPLE FROM YOUR COMMUNITY (CHURCH, CLUBS, STORES, ETC.)		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
Name:		
Phone:		
Email:		
Address:		
Name:		
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CPASS HAWAII EVALUATION FORM

Your comments provide us with valuable information that helps us to improve our handbook. Please provide your evaluation and send this to the CPASS project.

Tips & Suggestions for Getting Started Sample Worksheets

YOUR NAME: _____

DATE COMPLETED: _____

	Excellent					Poor	N/A
	5	4	3	2	1		
SUBJECT							
Did you learn anything?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was this information understandable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the content good?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the content useful?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the information well organized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How long did it take you review this section? <input type="checkbox"/> 1 hour <input type="checkbox"/> 1-2 hours <input type="checkbox"/> 2-3 hours <input type="checkbox"/> 3-4 hours <input type="checkbox"/> other _____							
Was this too long? <input type="checkbox"/> YES <input type="checkbox"/> NO							
What was most helpful? 							
What was not helpful? 							
What could make this more helpful? 							
What else do you need to know? 							
Comments: 							

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