

APPENDIX C

Themes, Comments, and Observations
of
Advisory Committee
Social Workers, Family Advisors
Project Facilitator
Service Coordinator
Fiscal Intermediary
Summary Train-the-Trainer Suvey

	Individuals with disabilities are now speaking up.
	Organized food and snacks for meetings from own resources.
• Knowledge/ awareness	Touched how individuals with disabilities are often not understood.
• Empowerment	Personal growth in advisory committee members.
	True leadership emerged. From being afraid to speak to running meetings, facilitating participation, organizing end of project activities, soliciting new members.
	Willingness to make hard decisions.
	Ethical considerations made.
	Selection process done with careful evaluation, unbiased, consideration for ability to relate successes and failures of project.
	Above empowerment and growth of advisory committee members was a beautiful and unforeseen benefit in early planning of project.
	Advisory committee had tremendous impact on all aspects of this project.
	Perseverance of Advisory Committee.
	Advisory Committee members able to voice their concerns, share what they really wanted to share.
• Community partner(s)	Willingness of Guma Mami', Inc. to write the grant without compensation because they believed in the principle of individualized budgeting, individual choice, and self determination.
• Successes	Transfer of project from Guma Mami' and CEDDERS to Government entity and consumers.
	Participant stories truly relate the success of this project.
	Participants looked at self employment options to improve living standards and independence in the future. Excellent marketing strategies for emerging businesses were evidenced at Summit and final wrap up meeting.
	Communication, information and education improved for participants. Internet use was visible.
	Promise for funding next phase.
Cons	
	Delays. Multiple changes in DISID personnel and delay in fund releases created doubts project would happen.
	Length of project.
	Disappointment in Real Choice Grant (Public Health) inability to develop tracking system and conduct summit to develop long term comprehensive plan, all portions of collaborative work planned with Inadanña para Tinilaika.

FISCAL INTERMEDIARY- Comments and Observations collected by Interview	
What systems change did you observe?	The procedure to request checks and payments. Time was shortened significantly.
Did this change bring about greater inclusion?	I think so. Now they have this money to spend...that was the primary catalyst for them to be included. It really made a difference.
Describe the effect on the individuals you observed.	Their attitudes changed. They were far more positive. They gained a greater understanding of budgets towards the end of the project. The budget planning portion helped them be more definite on what they needed.
In your opinion, would the support/occurrence/service have occurred within the old system of support?	NO.
What Systems Change should occur for the next phase of Individualized Budgeting?	Any subsequent phase that serves more people will require a schedule of payments, perhaps 2 times during the month. This will be for the management of dispersing funds from the fiscal intermediary.
Which part of implementing the grant gave you the most difficulty?	<p>Getting started involved a lot of time, especially all of the orientation meetings and individual's budget meetings in which we were asked to participate. Establishing the individual accounts took more time than distributing. Estimate 1.5 weeks to set up the ten files, thereafter we spent about 1 to 2 hours per week for the distribution duties, which was quick and easy. Now that I know the systems needed, a next round would be easier and I could delegate to lower level employees in the office.</p> <p>Financially, we had to upfront some cash to complete the project because we did not get the distribution of funds from the government. This was the risk that we took, feeling that we would probably be reimbursed. I don't know if another (vendor) would have had the cash resources to cover it and make the decision that we did.</p>

SERVICE COORDINATOR - Comments and Observations collected by Interview	
What systems change did you observe?	
Did this change bring about greater inclusion?	
Describe the effect on the individuals you observed.	
In your opinion, would the support/occurrence/service have occurred within the old system of support?	
Which planned Systems Change was not observed?	
Why do you think this happened?	
Did this affect individuals' inclusion in their community?	
What Systems Change should occur for the next phase of Individualized Budgeting?	
Which present systems support individuals' inclusion in their community?	
Which part of implementing the grant gave you the most difficulty?	Accessing the approved funding for grant activity. A problem existed in getting cooperation from other agencies to play as networking partners to resolve the difficulty we had in getting money to flow for approved grant activities.
Why?	This delayed the implementation of the individualized budgeting and affected the participation of individuals selected to test a new system.

on-going financial processing, there has to be greater emphasis placed on “needs” versus “wants or wishes”. It is important that signatures on the voucher be reduced. It is equally vital that the submission of vouchers and issuance of checks for purchases and payments be scheduled so as not to create undue overload at the Fiscal Intermediary level.

Direct Benefits to Participating Consumers:

I have observed that most, if not all, the Pilot Project participants benefited directly in the strengthening the family supports around them, by working out more practical transportation, by enhancing their home environment, by having “hands-on” control of rental and utility payments, in a decision to start producing or seeking income, in knowing how to search for pricing and other relevant information for products or services needed in their Individual Service Plan, in how to initiate and process vouchers to obtain the checks for purchases, and in recognition of their respective social or case worker and the essential role they have in their own recovery, treatment, health or independent living plan. I have found that the Pilot Project made these individuals more aware of the potential of utilizing personal care assistance/care attendants, budgeting, financial integrity, accountability, family relationships, social affairs, dealing with stores and businesses, government operations and public affairs, community involvement and volunteering, the existence of community and faith-based organizations and their roles, basic principles of governance and the opportunities to participate as advocates, and about micro-enterprise and the small business start-up process.

Additional highlights:

DeNight Advertising was afforded opportunities in which to document the Pilot Project participants in their group interaction and with personal interviews as they worked on the Video Production over time. The Impact Study by CEDDERS was revised to reflect “Initial Findings” for presentation at the Symposium. As to this Symposium, well it really is all about the ten individuals who applied for and agreed to cooperate in the implementation of the Individualized Budgeting as a pilot project. Essentially, it means that they were bold enough in their aspirations for a better level of independence to want to be pioneers on behalf of all those that would be following into this new DISID “person-centered, consumer-driven” delivery of service to individuals with disabilities.

Conclusion and Appreciation:

The entire Individualized Budgeting Pilot Project is all about systems change in the Guam social service delivery to individuals with disabilities and their families. It means that we recognize that “knowledge is power” and that we, therefore, empower our consumers with essential knowledge about Guam’s social service system to enable them to truly partner with us in their recovery, in their restoration to health, and in their individual, respective endeavor towards independent living level of their choice and available resources.

“Put Respetu”


GREGORIO S. CALVO CONSULTING

September 8, 2005



Survey Summary
 Personal Assistant Train-the-Trainer
 March 18, 2005

As a result of this presentation, I have increased my general knowledge and awareness of personal assistant management.	Strongly agree (Score 5) 13 Agree (Score 4) 3
This presentation provided me with information and/or ideas which can apply to my current or future employment setting.	Strongly agree (Score 5) 14 Agree (Score 3) 2
I found the presentation of materials relevant and supportive of my learning process.	Strongly agree (Score 5) 14 Agree (Score 4) 2
What did you like about the presentation?	Providing the consumers & service provider a new idea to develop appropriate services and in economical ways.
	The explanation between or comparison of a caregiver vs. a P.A.
	It will teach the presenter to work with the individual with disabilities.
	Tools that I may use. If I ever encounter a client that may need this assistant.
	Very informative, interesting & useful.
	Environment, facility, time frame.
	The time was exact.
	The fact that it was excellently presented.
	The presentation has a good video that we can see people that actually in the PCA services. However, that is not enough.
	Very informative, clear, comfortable.
	More insights into the newest thing for Guam making individuals with disabilities more independent.
	The class really opened my eyes to both the need for services---range of service. Consumer drives services!
	Understanding the views of the consumers.
	The general sections and the relevance of the details.

Are there any changes you would recommend for this presentation?	To understand what is the whole purpose of our role.
	None.
	None.
	None.
	A larger meeting area.
	Nothing except to be more improved.
	None.
	Test video programme again before actualization.
	None.
	NA
Additional comments.	I thank Mr. Calvo for extending an invitation to me. This allows me to understand PA as an employer.
	Well! Everything that she discuss is a learning lesson for everyone.
	Great job.
	Thank you for your presentation.
	It was a wonderfully put together seminar. Job well done!! I was glad to be a part of the group.
	Yes. I feel to have this PCA presentation to any conference. More update materials if possible.
	Its very clear and very informative as is.
	Thank you for inviting me to participate.
	Instructor showed good coping skills. Lots going on while trying to present (flow and technical assistance – computer blitz).
	Excellent venue. GSAT facilities, though simple, was very adequate for this workshop.