

Module 3

Self-Direction: An Introduction for Families and Professionals

This presentation includes introductory information about self direction.

Trainer's Notes

This is an introductory slide for this module.

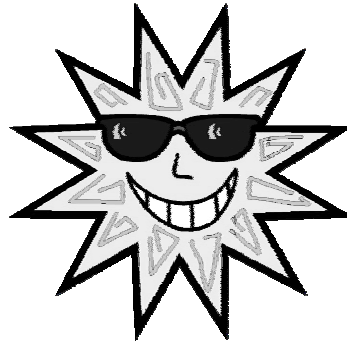
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The materials for this presentation were developed by the Partnership for People with Disabilities at Virginia Commonwealth University. Funding was provided through the Virginia Department of Medical Assistance Services with grant support from the Centers for Medicare and Medicaid Services.

Trainer's Notes

Tell the audience who developed the materials and who funded the development of the materials. Use your own words and discretion in how you present this information.



Module 3

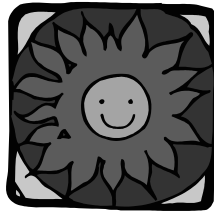
Self-Direction: An Introduction for Families and Professionals

Today, there is recognition on a national level of barriers that keep people with disabilities from enjoying their Constitutional freedoms and the promise of community living. The Centers for Medicare and Medicaid Services, the federal Medicaid agency states, "While more people may be served (through Medicaid waivers) the opportunities for community presence and participation, the interface with the informal caregiver system and generic community supports, and the support for individuals to sustain valued social and economic roles in the community have not necessarily improved." [CMS, 2001]

Efforts are being made nationally and in most states (including Virginia), to eliminate barriers and to promote the integration of individuals with disabilities into the mainstream of American life.

Trainer's Notes

This introductory training session is designed to give basic information on self-direction and encourage a new approach to supporting people with disabilities and their families. For many people in the audience this may be a fundamental shift in the way they do business and in the way they think about people with disabilities and their families.



We will discuss:

- Principles of self-direction
- Importance of dreams and having choice

OVERVIEW

Participants

The training curriculum is designed for self advocates, family members and professionals, especially case managers, CD services facilitators, and public and private providers.

Participant Competencies

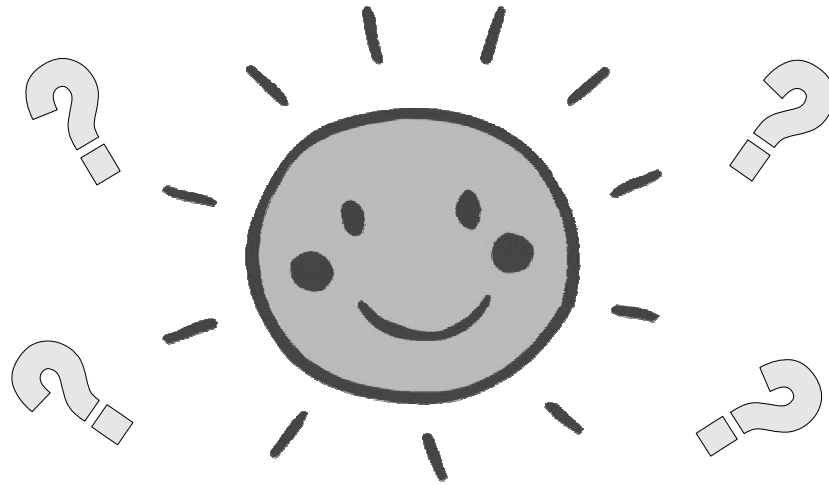
At the completion of this session, participants are able to:

- Understand the basic principles of self-direction.
- Describe the importance of dreams and having choices.

Trainer's Notes

There may be questions about how this differs from our current system of services and support. Don't get too detailed here. Let participants know that the differences will become clearer as the training progresses.

WHAT is self-direction?



Self-direction is an approach that supports people with disabilities and their families in determining how to best plan, obtain, sustain, and manage supports and services. These supports and services are designed to meet the individual's needs and personally-defined outcomes in the most inclusive community setting.

Trainer's Notes

In this session, participants are introduced to the term “self-direction” and what it means for all of us as we live our lives. Participants will experience thinking of the things they want out of their lives and how people with disabilities have the same need to dream and to make choices based on their preferences. Participants are also introduced to the idea that we all make many choices each day, some big, some small. The choices that we make show how we want to live our lives.

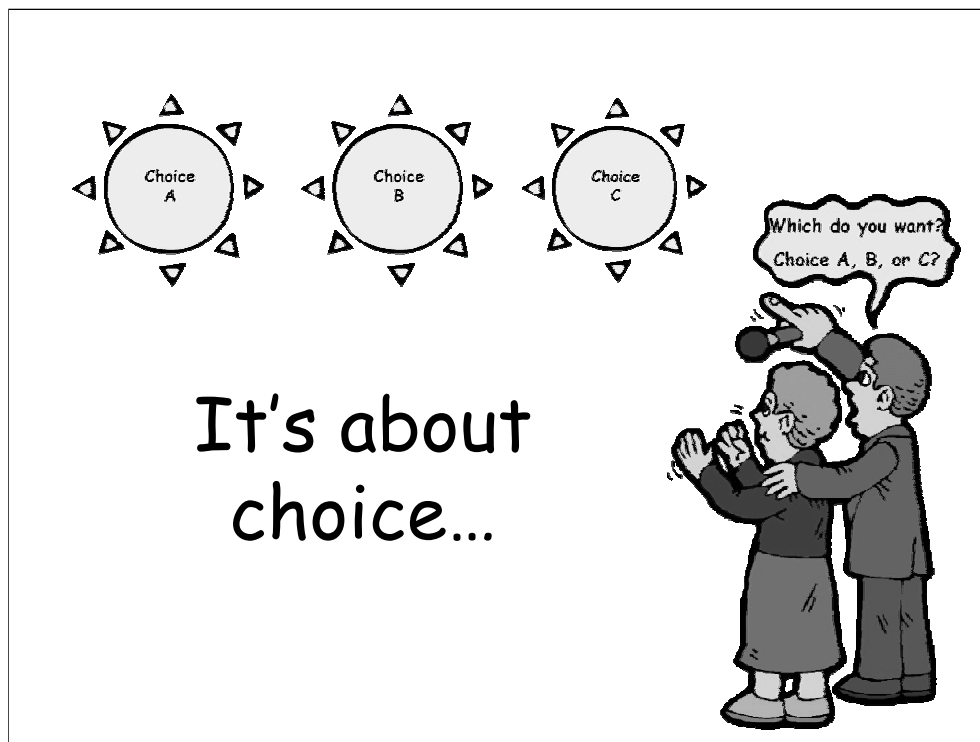
Self-direction ensures that individuals with disabilities have the means and the authority to determine what supports and services they need to be successful in the community.



Self-direction ensures that individuals with disabilities have the means, responsibility, and authority to determine and implement, with the assistance of chosen family, friends, and professionals, the supports and services they need to be successful in the community. Some of the supports and services are ones that are a part of “systems;” others are informal and generic and are just part of everyday community living.

Trainer’s Notes

Ask if participants have heard the term “self-direction.” If so, what have they heard? While recognizing concerns about changing the way the system works, take the opportunity to present positive examples of self-direction. Have examples ready to use. Don’t go into details as more information and examples will come later.



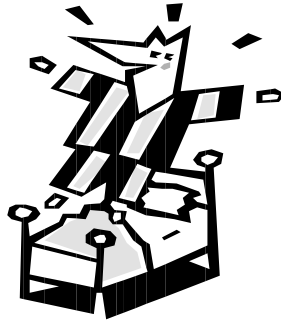
Choice is the freedom to direct one's life based on one's preferences.

Self-direction ensures that individuals with disabilities and their families have the freedom to live lives like everyone else, exercising all rights guaranteed under the Constitution. Individuals and families are no longer restricted to predetermined programs, but have the freedom to purchase options that naturally support the life of the individual and his or her family.

Trainer's Notes

It is important here to help participants see how they make choices in their own lives. Introduce the morning routine activity on the following page by explaining that it will assist in conveying how we all make choices and how we feel when choices are made for us. Write the word "freedom" on a flip chart.

Activity #1



Morning Routine

Activity 1: Morning Routine

This activity will help us think about the importance of choice in all our lives.

Step 1: Take a sheet of paper and write your morning routine, step by step.
What do you do first, second, etc.?

Step 2: Give your morning routine to the person on your left.

Step 3: Read the routine you have been given. How does it compare to what you do every morning. What if you had to change your routine tomorrow and follow the new routine you have been given?

Step 4: Ask participants to share their thoughts on how not having the freedom to choose something as simple as their morning routine would feel.

Trainer's Notes

This activity should take about 20 minutes. Move through the steps fairly quickly so participants give initial reactions. Have examples of a daily routine if participants have a difficult time getting started or you may use a participant's routine to emphasize the various choices we make each day.

Important choices...



Live



Play



Work



People in
Your Life

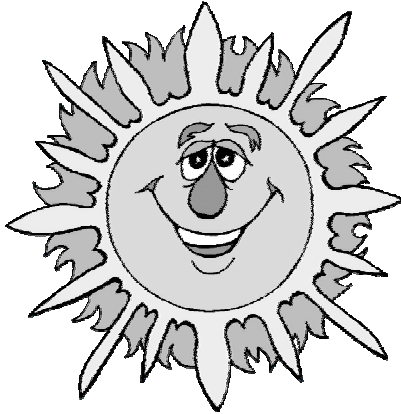
- Choosing where you live and with whom you live is important.
- Choosing where you work and what you do is important.
- Choosing how you spend your free time is important.
- Choosing who you spend time with is important.

Some choices are important to us and others are important for us. Choices that are important to us often reflect our personal preferences while choices important for us may address health and safety concerns.

Trainer's Notes

Ask participants if there are other choices that are important to them. Show the differences and similarities in what is important to choose. Our choices show our individuality.

Self-direction is about control...



Self-direction is about control.

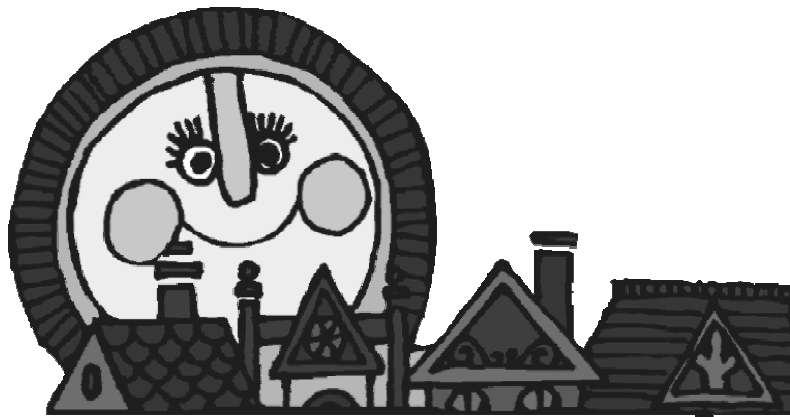
People with disabilities and their families have the **authority** and control over services, including funding, through self-direction. This creates financial accountability by individuals and families and recognizes their essential roles as consumers in planning, managing, and purchasing supports. Self-direction provides **authority** over how to spend an agreed resource amount. The flow of funds increases the **responsibility** of people with disabilities and their families to use funds wisely.

Control also gives individuals the ability to maximize flexibility and creativity of supports, allowing adjustments when needed, so people with disabilities and their families get what they need. If people with disabilities and their families are making the decisions, then it is expected that self-direction will provide a good fit between individual needs and required **support**. Flexibility also encourages non-traditional support which can lead to new solutions to the national and statewide shortage of available workers. Individuals can determine the unique **supports** that work for them, identifying trusted friends, neighbors, family members and providers to help to plan, implement, and evaluate supports and services.

Trainer's Notes

Write the words “authority,” and “support,” and “responsibility” on the flip chart as you discuss them.

It's about community...



Self-direction supports people moving from dependence on programs to interdependence in the community by building on their gifts and talents.

In the self-directed approach, people with disabilities, and if appropriate their families, take the lead in planning, implementing, and evaluating quality of life.

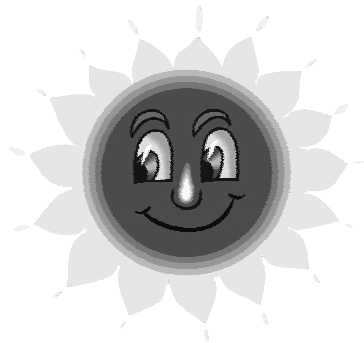
Self-advocacy is important on the personal and the systemic levels in self-direction. **Confirmation** of the central role of people with disabilities in determining the policies and processes that most effect their lives is a fundamental principle of self-direction. Self-advocacy groups such as “People First” are important to the success of self-direction.

Through self-direction, public dollars are viewed as an ongoing investment in the lives of people with disabilities. Individuals are expected to give back to society and contribute to their communities.

Trainer's Notes

Write “confirmation/self-advocacy” on the flip chart.

Self-direction's FIVE PRINCIPLES



- FREEDOM
- AUTHORITY
- SUPPORT
- RESPONSIBILITY
- CONFIRMATION

Freedom to live a meaningful life in the community.

Authority over dollars needed for support.

Support to organize resources in ways that are life enhancing and meaningful.

Responsibility for the wise use of public dollars to meet identified needs.

Confirmation of the important leadership that self-advocates must hold in a newly designed system.

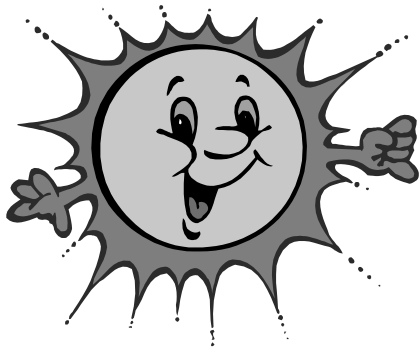
Trainer's Notes

Point to the words of the flip chart explaining these are the guiding principles of self-direction. Briefly review the meaning of each word.

Self-
direction is
also about
dreams.



Self-direction is also about dreams. Everyone has dreams or ideas about what they want to do in their life. Our dreams for our lives show the things that we prefer or the choices we would make for how we want to live our lives.



Activity #2

Dreaming Out Loud

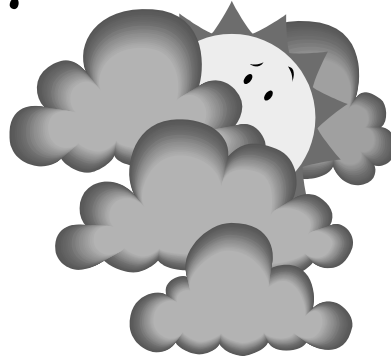
This activity will help us to begin thinking about dreams as things that we like to have happen in our lives, our preferences.

Trainer's Notes

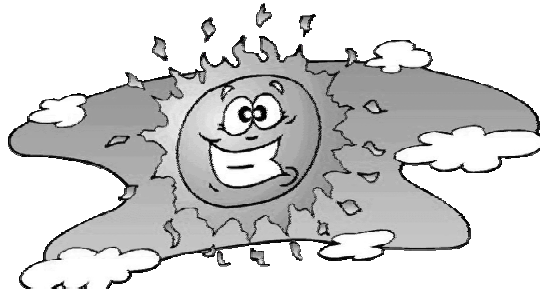
Resources Needed: Index cards (bright color cards that say YES) to use to respond.

1. Distribute the index cards
2. Read a series of statements and ask individuals to raise the card if they agree with the statement.

Statements- yes or no?



1. I am very flexible and could live with anyone who is selected for me as a roommate.
2. I enjoy spending time with others. I want to choose my own friends, my roommates, my life partner.
3. I want a good job and the respect that comes with being a contributing member of society.
4. I do not enjoy the independence that comes from having my own car and being able to get up and go where I want to go, when I want to go there. I'd rather depend upon family members, friends, or public transportation to get where I am going.
5. Sometimes my family needs help but I do not want other people telling me what we are able to do or what we should do. Still every now and again we could use some help like financial and investment planning, house cleaning, child care, income tax preparation, etc.
6. Sometimes I personally need support, assistance and even training in order to be successful in what I am doing. At times like this, I really appreciate friends and family being there when I need them.
7. I like other people managing my life. I prefer to be told when to go to bed and when to get up, what and when to eat, what social activities I can and should do. It just makes my life simpler.
8. Sometimes I am so irritated, upset, or annoyed that I can't even find the words to describe how I feel. When that happens I like my friends, family or co-workers to intervene and straighten me out for my own good.
9. I don't need my own money. I can live on a pittance. The money I have does not influence the choices that I make.
10. I want and expect my perspective to be included in the decisions that are being made about my life. When I choose people I want to help me make important decisions about my life, respect for my preferences is one of the criteria that I use.

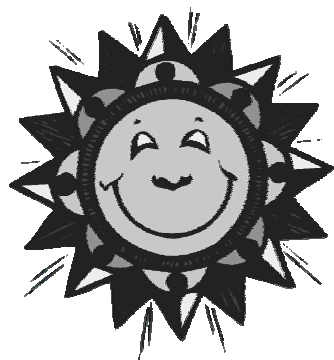


1. Was there a lot of agreement?
2. What does this tell us about ourselves?

Has there been a lot of agreement here? What does this tell us about ourselves? We have many similarities when it comes to our most basic aspirations about how we live, with whom we live, and how we exercise choice and control in our lives. We value our FREEDOM. We know a lot about self-direction. No one taught us from a curriculum. We've learned from life experience. We've had choice and control guaranteed to us under our Constitution. We don't like it when others try to deprive us of our Constitutional liberties. As a nation we were/are founded on the basis of struggling for the right to live as a free people.

Trainer's Notes

Help participants to see the areas of agreement if they have trouble doing so.



Activity #3

Drawing Your Dreams

Dreams are about the things that we want to have happen in our lives, the people who we want to be with, the places we want to go, the way we want to spend our time. Dreams are about our **choices** for **ourselves**. Dreams can be about big things and small things.

One of my dreams is...(give an example).

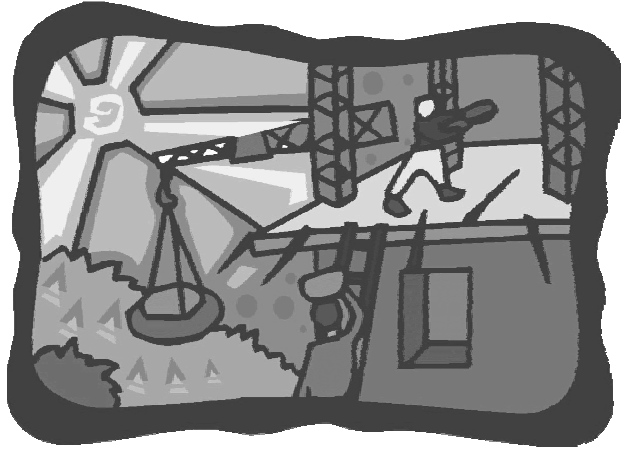
What are some of your dreams?

Trainer's Notes

Ask participants to draw their dreams for themselves on the handout, "*My Dreams*." Then give individuals a chance to talk about some dreams that they have. Continue to reinforce that people with disabilities have similar dreams to people without disabilities.

See Handout 3-1

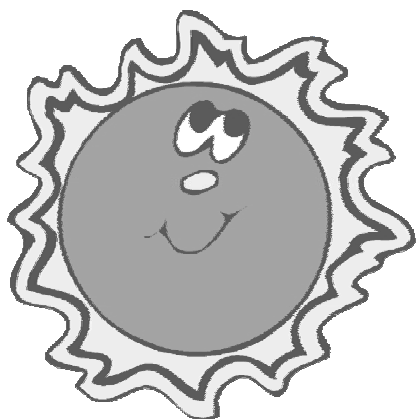
BUILDING ON DREAMS



Self-direction is about **your** dreams and **your** choices. Dreams are not one size fits all. Yet, even the most independent of us rarely realizes a dream without the help of others. Just like each of us, people with disabilities can use the support of family, friends, and professionals in achieving their dreams.

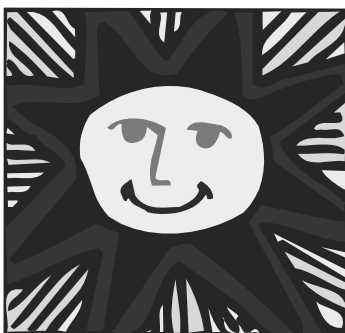
Trainer's Notes

Encourage participants to remember their feelings during the “morning routine” and “dreaming out loud” activities. The importance of dreams and the realization that people with disabilities have dreams too (like we do) are integral to the success of self-direction.



How
important is
self-
direction to
people with
disabilities?

People with disabilities, just like the rest of the population, come in all shapes and sizes. Some individuals with disabilities want to maintain total control over their lives and all of life's choices. Other individuals have particular dreams that are important to them. All individuals with disabilities have the same rights as all other Americans to express their choices and direct their own lives to the fullest extent that they want.



**Share your thoughts
with us...**

As part of our work, we are collecting ideas from you to help us improve both the information provided and the ways it is presented. Your answers to these few questions will help us.

Trainer's Notes

Hand out the evaluation form and ask each participant to complete.

See Handout 3-2