



clements centre
for **FAMILIES**

Sundrops | Adult
Child Development | Community Living

MONITORING TOOL FOR HOMESHARE

Name of individual: _____ Date of completion: _____

5856 Clements Street

Duncan, BC V9L 3W3

Ph: 250-856-2223

Fax: 250-746-1636

Website: www.clementscentre.org

Hours: 8:30 – 4:00 Weekday

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INSTRUCTIONS

The *Monitoring Tool for Homeshare* is used to evaluate the quality of services being provided according to standards that were endorsed by Community Living BC in April 2007. This tool can be used as a self-assessment or by an external reviewer. In reviewing Homeshare services, Clements Centre Society (CCS) staff are to be guided by applicable monitoring policies.

The tool reviews 15 standards in the following four domains:

- ✦ planning
- ✦ health, safety, and advocacy
- ✦ service-delivery
- ✦ resources

Each standard includes service outcome expectations with a number of indicators. As the monitor, you must determine whether expectations in each area are being met or whether improvement is required. The tool allows you to comment upon key findings for each standard and provides an area for you to develop an action plan to address required improvements. Based on the assumption that all services can be improved upon and the practices of continuous quality improvements, ***goals should be identified in each key area.***

Reviewers and Homeshare providers can consult this document for guidance on how to apply the standards in the Homeshare environment. The standard for the Homeshare.

DETAILS OF REVIEW

Name of Individual: _____

Homeshare Provider: _____

Name of Reviewer: _____

Position/Title: _____

Date of Review: _____

Copies of the completed review should be provided to the Homeshare provider and individual served (and / or legal representative, if appropriate). The original should be maintained by CCS.

PLANNING

1. PERSON-CENTRED PLANNING

standard: Each individual is supported to develop and accomplish long- and short- term goals through a personalized planning process. Homeshare providers implement plans, identify progress, and make adjustments to meet changing needs.

<i>service outcome expectation</i>		each individual has a written plan that directs the goals of his / her service	
	individuals have a documented plan that is used to direct service		
	individuals participate in planning for the service according to their wishes and abilities		
	Homeshare provider and others chosen by the individuals are involved in developing and implementing the plan		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		each individual is supported to achieve goals outlined in his / her plan	
	plans identify measurable, achievable goals		
	steps are taken by the Homeshare provider to implement the plan		
	individuals' activities are consistent with their personal desires within the plan		
	steps taken to achieve goals are evaluated and changes are made based on this progress		
	Homeshare provider has a system for tracking progress toward goals		
	individuals' specific needs related to planning are met (e.g. communication needs)		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
goals	person responsible	target date	completion date

2. HEALTH CARE PLANNING

standard: Homeshare providers ensure that each individual with significant health care issues is supported by planning that identifies critical health care needs.

<i>service outcome expectation</i>		each individual has a current health care plan that directs the provision of health care services	
	the health care plan covers areas where the individuals require planned medical / therapeutic support		
	qualified health professionals are involved in the development of the health care plan and approve the plan in writing		
	individuals, their families, or other supporters are involved in the development of the health care plan		
	assistants, including respite assistants, are familiar with protocols outlined and receive training as necessary		
	Homeshare provider ensures health care is provided according to the health care plan		
	the health care plan is monitored for its effectiveness in directing health care and changes are made to the plan as needed		
	Homeshare provider and assistants are clear on who has the legal authority to make health care decisions, emergency versus ongoing care, and role of the family		
	Homeshare providers have been informed regarding representation agreements and are aware of their purpose and the role of a committee if one has been appointed for an individual		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
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3. TRANSITION PLANNING

standard: When an individual moves into his / her new home, there is careful preparation to provide continuity for the individual and to ensure the Homeshare providers and assistants are aware of each individual's needs.

<i>service outcome expectation</i>		individuals are prepared for the new home	
	when possible, individuals initiate or are involved in the decision to move, the planning process, and the choice of home		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		Homeshare provider and assistants are prepared for the transition of individuals	
	a transition plan is developed in collaboration with individuals, their personal support network, and CCS staff prior to the move and responsibilities are understood		
	the plan reflects the wishes of the individual and others the individual chooses to involve, ensures the individual's needs will be met, and has specific timelines		
	individuals' specific needs related to the transition are met		
	the plan identifies that written records and relevant documentation is provided to CCS staff.		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		follow-up ensures the success of the transition and encourages improvement	
	when individuals change daytime services, the transition plan includes a strategy to minimize disruption (e.g. changing services to different times)		
	past support strategies that have been successful are transferred to the new home		
	all personal effects are forwarded		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
goals	person responsible	target date	completion date

HEALTH, SAFETY AND ADVOCACY

1. INDIVIDUAL CARE AND SUPPORT

standard: The home provides an environment that encourages the physical and emotional health and well-being of each individual. Medical and dental needs are attended to for each individual and special care needs are met for individuals with physical disabilities.

<i>service outcome expectation</i>		individuals live in a healthy home environment
	individuals are supported to maintain good personal and oral hygiene and to care for health aids such as glasses and dentures	
	the individuals' meals and snacks are nutritious, appetizing, and meet special dietary requirements	
	a healthy balance of physical activity and rest is supported / encouraged	
	clothing suits the weather and activity in which individuals are engaged	
	support is provided respectfully and self-reliance is encouraged in maintaining a healthy lifestyle	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
<i>service outcome expectation</i>		illness and other health concerns are remedied promptly
	individuals have a physician, dentist, and required specialists (e.g. physiotherapist, neurologist) and see them regularly and as required	
	symptoms of illness, significant changes in ongoing conditions (e.g. diabetes, weight loss / gain) are monitored and medical attention is sought promptly when indicated	
	Homeshare provider, assistants, and individuals have necessary knowledge of health conditions, whether temporary or ongoing	
	related directives (e.g. physiotherapy) are approved by medical professionals and implemented by the Homeshare provider and assistants	
	pertinent aspects of medical visits, dental appointments, and health care information are recorded and accessible to those who need to know	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
<i>service outcome expectation</i>		special and physical care needs are met
	written seizure and other specialized protocols (e.g. bathing guidelines) have been developed in consultation with health professionals and, as appropriate, family members	
	Homeshare provider and assistants are aware of techniques for support (e.g. lifting, positioning, feeding) and are sensitive to the individuals' needs and rights when performing these tasks	
	devices such as wheelchairs are in good repair and used according to care manuals (e.g. seating is addressed regularly to ensure comfort and support)	

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	all guidelines and protocols are consistently followed by those assisting the individuals		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>	individuals who have chronic emotional / behavioural difficulties receive treatment and support		
	to foster mental and psychiatric health, appropriate treatment and support is provided to individuals with chronic emotional and / or behavioural difficulties		
	diagnostic and / or other professional support is obtained as necessary		
	treatment / support plans, such as prescribed medication and specific behavioural approaches, are followed and monitored appropriately		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
goals	person responsible	target date	completion date

2. SAFETY AND SECURITY

standard: The home guidelines and procedures are designed for the safety and security of all individuals with particular attention to the special needs of individuals with physical disabilities and those who are unaware of danger.

<i>service outcome expectation</i>	fire safety and emergency preparation measures are in place		
	individuals are supported to learn and practice what to do in the event of a fire and other emergencies		
	emergency kits are in place to use in the event of an emergency (e.g. earthquake, natural disaster)		
	Homeshare provider and assistants are aware of how to respond to an emergency situation, including ways to support individuals to evacuate the home under different circumstances		

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	the evacuation plan establishes a meeting place outside the home (e.g. a neighbour's home, significant landmark in the immediate neighbourhood)
	fire extinguishers are conveniently accessible in the home and smoke detectors are installed as advised by the fire department
	smoke detectors are tested annually, and serviced as needed
<input type="checkbox"/> meets expectations <input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>	medications and hazardous household products are stored and used safely
	where individuals require supervision near hazardous products, materials such as cleaning agents, gasoline, and matches are stored out of their reach or in a locked area
	as appropriate, individuals are supervised when using these products the proper storage and use of medications is understood and practiced by the Homeshare provider and assistants
	information about medications is kept on hand
	wherever possible, medications are not physically handled by anyone not taking them
	historical information on medications is available and includes purpose of medication and guidelines for when a dosage is missed
<input type="checkbox"/> meets expectations <input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>	environmental hazards are minimized for individuals who have physical disabilities, allergies, visual or hearing impairments, and / or epilepsy
	furnishings are arranged to allow for easy access by individuals with visual impairment
	changes to the environment are minimized and individuals are supported to become familiar with new arrangements
	specialized systems and adaptations, such as lights, are used for alarms and doorbells for individuals with hearing impairment
	if an individual has mobility challenges, handgrips and railings are in place
	allergies are noted in a prominent place among the individuals' support information and on identification individuals carry in the community
	supervision is provided for individuals with a seizure disorder while he or she is involved in activities that put his or her safety at risk (e.g. bathing, swimming, using steep stairs)
<input type="checkbox"/> meets expectations <input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>	precautions are taken to ensure individuals' safety
	first aid supplies are kept on hand at the home and in vehicles and vehicles are well maintained
	wheelchairs and other equipment are kept in good condition and are approved by an occupational therapist or other consulting professionals

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	techniques used to lift and transfer individuals are approved for the safety of the individual and assistants		
	individuals carry identification while away from home		
	individuals are taught how to be safe as a pedestrian, being aware of traffic, using crosswalks, etc.		
	individuals are taught assertiveness skills, such as learning about precautions for dealing with strangers		
	when involved in high-risk activities, such as boating or hunting, individuals are taught and supported to use safety precautions, all regulations are followed, and appropriate people (i.e. family members and either the responsible agency or CLBC quality assurance analyst) are informed		
	adults providing support and / or living in the home have completed a criminal record search and a copy is kept at the home or the CCS office		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		Homeshare provider and assistants are trained to respond to medical emergencies	
	Homeshare providers, assistants, respite providers, and volunteers, have current first aid certification and CPR training		
	Homeshare providers, assistants, respite assistants, and volunteers have training related to additional conditions such as severe seizures, respiratory ailments, allergies, etc.		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
Goals	person responsible	target date	completion date

Monitoring Tool

3. RIGHTS

standard: Homeshare providers and assistants respect each individual’s rights and act as an advocate for these rights.

<i>service outcome expectation</i>		Homeshare providers and assistants respect and protect individuals' rights	
	individuals are encouraged to involve family members (and other advocates) in decisions		
	individuals are supported to achieve goals related to his / her rights		
	Homeshare provider has written information and knowledge about the rights of adult citizens		
	Homeshare provider directs support in a manner that encompasses the individuals’ rights to choice and decision-making		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		individuals are supported to exercise their rights	
	Homeshare provider supports the individuals to exercise and advocate for their rights and advocates on their behalf (e.g. individuals are supported to vote if they choose to do so)		
	a plain language statement of individual rights is available at the home that reflects the philosophy of community living (e.g. dignity of risk, least restrictive environment)		
	guidelines for providing support (e.g. considerations of privacy, confidentiality, and personal dignity) reflect individual rights		
	individuals are supported to learn about their rights, using a variety of teaching techniques and learning situations		
	individuals have opportunities to learn that their rights are balanced by responsibilities		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
Goals	person responsible	target date	completion date

Monitoring Tool

4. HOME ATMOSPHERE

standard: Homeshare providers provide a home-like environment that allows individuals to live a personally rewarding life.

<i>service outcome expectation</i>		house and yard are safe and promote family style living	
	accommodation complements the needs and wishes of individuals and allows access to household items		
	individuals' right to and wish for privacy is respected (e.g. have the opportunity to have private telephone conversations)		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		each individual is supported to achieve goals related to the home	
	individuals are encouraged to develop a sense of ownership and belonging within the home		
	a comfortable home environment is maintained		
	each individual has the opportunity to personalize his or her room including pictures and mementoes of his or her history and culture		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		house and yard accommodate each individual's use of mobility aids (N/A if mobility aids such as wheelchairs or walkers are not used)	
	home has been adapted to accommodate individuals' use of mobility aids		
	outdoor area is accessible by individuals using mobility aids		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
goals	person responsible	target date	completion date

SERVICE DELIVERY

1. ACTIVITIES

standard: Each individual has the opportunity to take part in daily activities and participate with as few restrictions as possible in typical home living. Individuals have the opportunity and means to communicate their wishes and feelings, to develop satisfying social relationships, and develop skills that promote maximum independence.

<i>service outcome expectation</i>		individuals' skill development is encouraged and supported
	individuals are supported to join in conversations and express their choices	
	Homeshare provider and assistants support other methods of communication (e.g. sign and picture symbols)	
	individuals are supported to make choices in areas such as recreation, planning meals, household chores, and caring for clothing	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
<i>service outcome expectation</i>		each individual participates in preferred, interesting, and challenging activities
	a range of activities, at home and in the community, is offered to individuals and they are supported to participate	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
<i>service outcome expectation</i>		individuals are encouraged to participate in home living
	Homeshare provider emphasizes <u>doing with</u> (not for) individuals, encouraging them to participate in activities with as little supervision as is necessary	
	individuals have responsibilities for meal preparation and clean-up and take a role in planning for social events at the home, making decisions about the home, caring for pets, etc.	
	when required, consultation with physiotherapy and occupational therapy is arranged and adaptive equipment is used to increase involvement and independence at home	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
<i>service outcome expectation</i>		each individual is supported to learn skills to support future independence
	where appropriate, individuals are supported to manage their activities (e.g. administering their own medications, using public transit, managing their money, using the telephone)	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
KEY FINDINGS		

Monitoring Tool

<i>ACTION PLAN</i>			
goals	person responsible	target date	completion date

2. FAMILY AND FRIENDS

standard: Homeshare providers and assistants welcome the involvement of family and friends in the lives of each individual.

<i>service outcome expectation</i>	individuals are supported to develop / maintain positive relationships with family members, friends, and acquaintances
	individuals are supported to establish and achieve their goals related to family and friends
	individuals are supported and encouraged to have involvement with and access to their family and friends
	individuals are supported to develop skills in fostering and maintaining relationships
	individuals are supported to socialize with family and friends
	Homeshare provider respects each individual's informed choice about friendships and relationships he / she chooses to (or not to) maintain
<input type="checkbox"/> meets expectations	<input type="checkbox"/> needs improvement

<i>KEY FINDINGS</i>

<i>ACTION PLAN</i>			
goals	person responsible	target date	completion date

3. COMMUNITY INVOLVEMENT

standard: Homeshare providers make full and effective use of community resources. Homeshare providers and assistants initiate community contacts that promote inclusion for all individuals.

<i>service outcome expectation</i>		individuals are supported to use community-based services	
	individuals use or are supported to use a variety of community services		
	individuals' goals related to community involvement are supported		
	individuals have opportunities to develop natural supports, get to know their neighbours, and form relationships with other members of their community		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		individuals are supported to be contributing members of their community	
	individuals have opportunities to contribute to their community in relation to interests and wishes (e.g. employment, community boards, volunteering)		
	each individual's specific needs related to community involvement are supported		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		Homeshare provider and assistants seek and use information and support from community sources	
	Homeshare provider and assistants seek and receive supports from community and provincial organizations / groups		
	Homeshare provider and assistants make use of community resources for training and information (e.g. library, public health nurse, pharmacist, workshops)		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
goals	person responsible	target date	completion date

RESOURCES

1. LEADERSHIP AND CO-ORDINATION OF SUPPORT

standard: The Homeshare providers are qualified and experienced and have regular, direct contact with each individual receiving service, assistants, and others involved in the individual's life.

<i>service outcome expectation</i>	Homeshare provider is trained and experienced		
	Homeshare provider has training relevant to supporting individuals receiving service		
	Homeshare provider has demonstrated skills and abilities for working with individuals who have developmental disabilities		
	Homeshare provider has training and mentoring abilities to provide support, direction, and feedback to assistants		
	Homeshare provider is readily available to individuals, assistants, and others involved with the service		
	Homeshare provider requests and works collaboratively with professional supports		
	Homeshare provider has a positive relationship with individuals that reflects mutual respect, trust, and ethical conduct		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>KEY FINDINGS</i>			
<i>ACTION PLAN</i>			
goals	person responsible	target date	completion date

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2. STAFFING (WHERE APPLICABLE)

standard: The home is staffed to meet the needs of each individual with an attitude of respect for each individual and an underlying commitment to providing a good quality of life.

<i>service outcome expectation</i>		levels of support ensure individuals' needs are met	
	the number and availability of assistants to provide support is sufficient to meet the individuals' needs and service goals		
	Homeshare provider hires assistants whose abilities and attitudes are compatible with the needs of the individuals		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		Homeshare provider / assistants develop positive relationships with the individual	
	Homeshare provider and assistants are familiar with the individuals' goals, needs, and preferences		
	Homeshare provider and assistants are positive and respectful in their interactions with and support of individuals		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		respite is provided in a responsible manner	
	respite providers have relevant experience and have the emergency and other essential information required to provide adequate support to individuals		
	Homeshare provider ensures respite assistants maintain valid first aid and CPR certification		
	respite assistants provide completed criminal record searches prior to working with the individuals		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
goals	person responsible	target date	completion date

3. TRAINING OF ASSISTANTS

standard: Homeshare providers ensure that assistants are familiar with their responsibilities and receive necessary training. Assistants demonstrate suitability for providing good quality support to the individuals.

<i>service outcome expectation</i>		assistants are trained and supported to provide individuals with good quality service	
	Homeshare provider supports assistants to understand their role regarding mutual respect, trust, and ethical conduct		
	assistants are knowledgeable about and provide support according to the individuals' goals and needs		
	assistants are supported to develop skills and use appropriate opportunities for professional development regarding the individuals' specific health and support needs		
	skills and knowledge acquired through training are shared with other assistants assistants' ideas and suggestions are sought and addressed		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
<i>service outcome expectation</i>		all assistants are oriented to the home and service provision requirements of individuals	
	Homeshare provider provides assistants with an orientation to all aspects of supporting each individual prior to working alone with individuals		
	assistants are aware of procedures for behaviour management, fire safety, critical incidents, accidents, missing persons, etc.		
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement	
KEY FINDINGS			
ACTION PLAN			
goals	person responsible	target date	completion date

4. GUIDELINES AND PROCEDURES

standard: The home has guidelines and procedures that meet all requirements of health and safety, fiscal responsibility, individual documentation, and record-keeping.

<i>service outcome expectation</i>		Homeshare provider has guidelines / procedures
	information related to the service is current, organized, easy to locate, and arranged in a user-friendly format for the Homeshare provider and assistants	
	Homeshare provider has a copy of CCS standards and guidelines for responding to critical incidents, suspected abuse, and challenging behaviour	
	emergency information to be used (e.g. missing persons protocols, emergency admission to the hospital) is readily available at the home and in vehicles	
	emergency information lists facts (e.g. physical description, medications, critical support needs, emergency contacts) and includes a current photograph	
	procedures for administering and managing medication, conducting a search, responding to a fire and other emergencies, providing personal care, and response to allergies are clear	
	where assistants are employed and / or several people provide support, these procedures, along with others such as daily routines and schedules, are documented	
	there is a guideline regarding smoking in the home and the community that is respectful of non-smokers' and smokers' rights	
	where assistants are employed, the Homeshare provider has prepared emergency information that is available to the assistant(s)	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
<i>service outcome expectation</i>		procedures are in place to account for individuals' monies and belongings
	where individuals require assistance to manage their funds, an accounting system is in place for the individuals' income, expenditures, and bank balance	
	income assistance, wages, clothing allowances, tax rebates, and other sources of income are included	
	individuals are supported to submit or seek assistance for submitting income tax returns to ensure tax return is received annually	
	a current list of the individuals' major and significant belongings is available and updated on an annual basis (should there be a fire, theft, or other need to account for them)	
	a copy of the belongings list is kept in each individual's file at the local, the agency's central office	
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement
<i>service outcome expectation</i>		individuals' programs and supports are documented
	individualized plans, approaches to support, personal and health information, names and numbers for family and friends, and other material is current, organized, and accessible to the individual, Homeshare provider and assistants	
	progress reports are sent to CCS as required by contract or upon request	

	measures are in place to ensure confidentiality of all written material		
	assistants and others working in the home sign a generic agreement to confidentiality prior to engagement		
<input type="checkbox"/>	meets expectations	<input type="checkbox"/>	needs improvement
KEY FINDINGS			
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5. COMMUNICATION AND PROBLEM-RESOLUTION

standard: The individual experiences meaningful relationships that promote mutual respect, independence, and quality of life. Communication channels are clear. Effective ways of preventing problems and resolving individual differences are used and encouraged.

service outcome expectation	Homeshare provider and assistants are effective in helping individuals resolve problems		
	methods used to support individuals are positive, understood, and used consistently by the Homeshare provider and assistants		
	Homeshare provider and assistants encourage individuals to solve problems for themselves and to develop positive coping skills		
	where an individual demonstrates behavior that negatively affects that individual's or another's quality of life, approaches are developed collaboratively with other stakeholders (e.g. professional consulting specialists), are documented, and used consistently by the Homeshare provider and assistants		
	strategies and response guidelines, including any restrictions used, follow CLBC policy		
<input type="checkbox"/>	meets expectations	<input type="checkbox"/>	needs improvement

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<i>service outcome expectation</i>		clear, open communication is fostered between the Homeshare provider, assistants, CLBC representatives, and individuals		
	Homeshare provider keeps others with a need to know (e.g. individuals, CCS representatives, family members, day service staff and professional supports) informed of significant events			
	Homeshare provider and CCS representatives regularly communicate with one another and other stakeholders about milestones, concerns, and other issues			
	positive relationships among all members of the support team are fostered (e.g. a problem resolution process is in place and roles and responsibilities are understood by all)			
<input type="checkbox"/> meets expectations		<input type="checkbox"/> needs improvement		
KEY FINDINGS				
ACTION PLAN				
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Monitoring Tool

Annual Resource Review

Date: _____ Contractor Name(s): _____

Homeshare Coordinator _____

Have there been any changes in the following areas since your last home study or review?

- | | | |
|----------------------------------|------------------------------|-----------------------------|
| Family composition | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Physical and mental health | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Employment | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Interests, community involvement | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Change of address/phone number | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Other significant changes | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

For those areas you have indicated 'Yes' please describe the changes.

Please list all persons currently living in the home and their relationship to you:

Please list all training events attended in the past 12 months. _____

In what topics would you like to receive information or training? _____

Questions/comments? _____

Service provider signature: _____

Coordinator signature: _____

Monitoring Tool Assessment Actionable Items

This is a companion to the Monitoring Tool and notes details of items not meeting requirements which must be addressed in order to meet contractual obligations with Clements Centre Society (CCS). Upon completion of outstanding requirements, the provider signs and dates this form and returns it to CCS. The original is kept on file at CCS and a copy is given to the Homeshare provider.

Name of individual: _____

Date of assessment: _____

Homeshare provider: _____

Homeshare coordinator: _____

Outstanding requirements to be met	Timeline
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Completion date of all actionable items: _____

Signature of Homeshare coordinator: _____

