

# **Working With A Support Coordinator**

**A Handbook for Parents  
Families, Guardians and Advocates**

**A Project Funded and Directed By:  
The Florida Developmental Disabilities Council  
Community Living/Support Coordination Task Force**

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## **ACKNOWLEDGMENTS**

Special thanks to the following individuals who volunteered  
their time  
and talents to developing this handbook

Denise Arnold  
Bob Foley  
Emma Guilarte  
Tessa Little  
Lou Piotrowski  
Lila Pridgen  
Susan Prater-DeBeaugrine  
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Marcia Simmons  
Marnie Starbuck  
Lori Violette

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Improved Practices Work Groups

This project was produced by  
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## **PREFACE**

The content for this handbook came from a variety of sources: Florida law and administrative rule, Florida Developmental Services Program policies and procedures governing support planning and support coordination, and published literature in the areas of advocacy, choice and person-center planning. We reviewed *thousands* of pages of source material. Our goal was to publish a handbook that was readable, practical, useful – and under 100 pages.

However, most important to the development process were the people who reviewed, revised and contributed to the content. Our special thanks to the advisory group created to oversee content development. Members of the group, which included individuals receiving services, parents, professionals, advocates, Council members and staff, are listed on the acknowledgements page.

Most of all, we owe a debt of gratitude to the members and staff of the Florida Developmental Disabilities Council for their continued dedication and commitment to Floridians who have developmental disabilities. Heartfelt recognition needs to go to the Council's Community Living Task Force and two people in particular – task force chairperson, Ms. Lou Hanna Piotrowski and Ms. Susan Prater-DeBeaugrine, staff person – for their vision and foresight in initiating and supporting this crucial project.

Pietroangelo Production Group, Inc.

## FORWARD

This handbook, *Working With A Support Coordinator*, was developed for families, guardians and advocate to help them get the most from support coordination.

It is the first in a series of training programs on support coordination planned by the Florida Developmental Disabilities Council. This first module also includes a workbook, a video, and audiotape for individuals receiving services.

The handbook opens with a review of how and why support coordination began. Next, it takes a look at the key things that make up the support planning process. Then, it reviews the role and responsibilities of a support coordinator. Following that is some practical advice on how to select a support coordinator, change support coordinators, and ways to foster a good working relationship with these professionals.

Overall, this handbook should help you better understand the support planning process and help you work more effectively with your support coordinator and other service providers.

***There are some differences in support coordination if you are not enrolled in the Developmental Services/Home and Community Based Services (Developmental Services/HCBS) Medicaid Waiver. These differences are noted where they occur.***



## SECTION 1

# AN INTRODUCTION TO SUPPORT COORDINATION



### **SUPPORT COORDINATION IN FLORIDA**

In 1989, Florida dramatically changed the way people who have developmental disabilities are served. The state began using a type of case management called

***support coordination.***

Why change a working process that had been in place for more than a decade?

The main reason was growth. As the nation's fourth most populous state, Florida's growth had greatly increased requests for developmental services.

And, while the need for services had increased, the number of case managers had not. Caseloads for workers had become unmanageable. But the need for change went beyond the issue of workload.

Throughout the nation, the basic philosophy for supports and services for people with developmental disabilities was changing. Florida would be a leader in these changing times, adopting ***support coordination*** and the process of ***support planning.***

Support planning allows people with developmental disabilities, and their families, **to make more decisions** about the services that affect their lives. It enables the individuals to **live in communities** of their own choice, and it allows people with developmental disabilities to be involved in activities they value.

## **THE IDEAS BEHIND SUPPORT**

### **COORDINATION**

- **Support planning is person centered.** This means the main emphasis is on personal choices and preferences.
- **Individual choice** – needs, hopes, likes & dislikes are a priority.
- Helping people reach goals or **outcomes** is the main purpose.
- **Community-based supports**, services and resources are obtained to help people.
- **Community inclusion** – helping people to live and take part in their communities – is the overall goal.
- **Natural Supports** – community resources available to everyone and resources available through neighbors, friends and family are an important part of the process.
- Supports and services are based on a **Support Plan** that is developed under

the direction of the individual and,  
as appropriate, the family or  
guardian.

- **Support coordinators** are an important part of the process.



*Then: In the past, many individuals were excluded from community activities because they lived in large institutions like the now closed Sunland Center Orlando.*

#### **PHILOSOPHY: THEN AND NOW**

Support coordination is very different from case management of the past.

In the 1960s Developmental Services provided *treatment* to people using a *medical* model. In the 1970s the emphasis was on training, helping people develop skills using what was called a *developmental model*. Today, the goal is on achieving individual outcomes using a *person-centered model*.

How the Philosophy Changed		
	Then	Now
<b>You Get Services Based On:</b>	<ul style="list-style-type: none"> <li>• What was available</li> <li>• Opening in a program</li> </ul>	<ul style="list-style-type: none"> <li>• What is needed to reach an outcome or goal</li> </ul>
<b>Who Make Decisions:</b>	<ul style="list-style-type: none"> <li>• Decisions made by professionals or team</li> </ul>	<ul style="list-style-type: none"> <li>• Individuals make the decisions</li> </ul>
<b>Goal of Services:</b>	<ul style="list-style-type: none"> <li>• Goal was medical maintenance or training</li> </ul>	<ul style="list-style-type: none"> <li>• Goal is to reach an outcome that enables people to live as independently as possible</li> </ul>
<b>Approach:</b>	<ul style="list-style-type: none"> <li>• Segregation in institutions</li> <li>• Specialized community facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Community inclusion with people choosing where they want to live</li> </ul>
<b>Social Opportunities:</b>	<ul style="list-style-type: none"> <li>• People with disabilities interacted mostly with other people with disabilities</li> </ul>	<ul style="list-style-type: none"> <li>• People encouraged to take part in community activities</li> </ul>
<b>Who Provides Services</b>	<ul style="list-style-type: none"> <li>• Government (if funds were unavailable, services not provided)</li> </ul>	<ul style="list-style-type: none"> <li>• Goal is to use community resources and allow family, friends and neighbors to be involved</li> </ul>

- **Then** – the system provided for treatment or services based on what the system had available to offer or what programs had an opening. **Now** – the emphasis is on person-centered approach that focuses on supports and services that will help a person reach specific goals (outcomes).
- **Then** – decisions were made by professionals or an interdisciplinary team. **Now** – the individual makes the choices.

- **Then** – the goal was to provide medical maintenance or developmental training.  
**Now** – the emphasis is on providing supports and services to reach outcomes that help people live independently in their community.
- **Then** – Florida (and other states) maintained a system of *segregation* in institutions; later the emphasis was on *integration* with community-based facilities.  
**Now** – the emphasis is *community inclusion* with people choosing where, how and with whom they want to live, preferably in their own homes.
- **Then** – people with disabilities mostly interacted with each other.                   **Now** – people are encouraged to do things they can in their community.
- **Then** – if money wasn't available to pay for a service, or if the state could not provide a service, people went without.  
**Now** – it is easier for people to take advantage of things that are free or available through friends,



family and neighbors.

*Now: Group homes and other community residences enable people with disabilities to be involved in their community.*

SECTION 2  
**WHAT'S WHAT IN SUPPORT  
COORDINATION**



**INTRODUCTION**

This section will give you a quick tour of support coordination. Here we want to introduce you to some of the key parts of the support planning process. These same topics will be covered in greater detail in later sections.

**WHAT IS SUPPORT PLANNING?**

Support planning is a *process*. It is a process:

- For identifying an individual's wants or needs
- For identifying goals or outcomes for an individual.
- For obtaining supports or services needed to reach those goals.

- That uses a Support Plan as a map for how supports and services will be provided to help people reach outcomes or goals.

## WHAT IS AN OUTCOME?

*Outcomes* are those things that you want to have happen in your life. Outcomes are goals for someone's life.

In support planning, outcomes are **written as statements**, based on a want or need. For example:

NEED/WANT	STATED AS AN OUTCOME
Shopping	<ul style="list-style-type: none"><li>I would like to be able to go shopping to buy her own clothes, food and for fun.</li></ul>
Better food	<ul style="list-style-type: none"><li>I would like to be able to eat what I like to eat.</li></ul>
Working with animals	<ul style="list-style-type: none"><li>I would like to have a job working with animals.</li></ul>

## WHAT IS A SUPPORT?

A support is an *activity* or *service* that **helps an individual reach a goal or outcome**. Supports can help people reach goals at home, work or school, and in the personal or social aspects of life.

In the support planning process: 1) identify wants and needs, 2) state those wants or needs as an outcome or goal to be reached, 3) identify the supports (or services) needed to reach that goal.

## What Is a Support? ~~(continued)~~

Using the examples above:

NEED/WANT	OUTCOME	SUPPORT NEEDED TO REACH OUTCOME
Shopping	<ul style="list-style-type: none"> <li>I would like to be able to go shopping to buy my own clothes, food and for fun.</li> </ul>	<ul style="list-style-type: none"> <li>Transportation – Sally will learn how to use public transportation.</li> <li>Money Management – Sally’s aunt will teach her about personal finances.</li> </ul>
Better food	<ul style="list-style-type: none"> <li>I would like to be able to cook what I like to eat.</li> </ul>	<ul style="list-style-type: none"> <li>Cooking class – John will take an introduction-to-cooking class at his community recreation center.</li> <li>Cookware – John’s neighbor gives him some pots and pans she is not using.</li> </ul>
Working with animals	<ul style="list-style-type: none"> <li>I would like to have a job working with animals.</li> </ul>	<ul style="list-style-type: none"> <li>Information – Sam will check out videos on animal care from the local library.</li> <li>Job Training – Sam will volunteer at a local kennel, feeding and walking dogs to get experience and see if he likes working with animals.</li> </ul>



## **Different Types of Supports**

There are different types of supports. They vary depending on who is providing the support. The ideal Support Plan includes a mix of different types of supports.

Having supports provided by different sources helps ensure an individual stays connected to a range of helpful people – family, friends, advocates and paid professionals.

### **Family Support**

**Family support is assistance or help provided by a family member.** For example:

You have a school-age child and you've arranged for him to take the bus to his aunt's house after school, where you pick him up after work.

There are two important and unique benefits of this type of support. First, it saves on childcare costs; the money saved here could be used for some other paid support. More importantly, it allows the child to develop a personal relationship – a friendship with an adult family member. This is an experience that can't be bought.



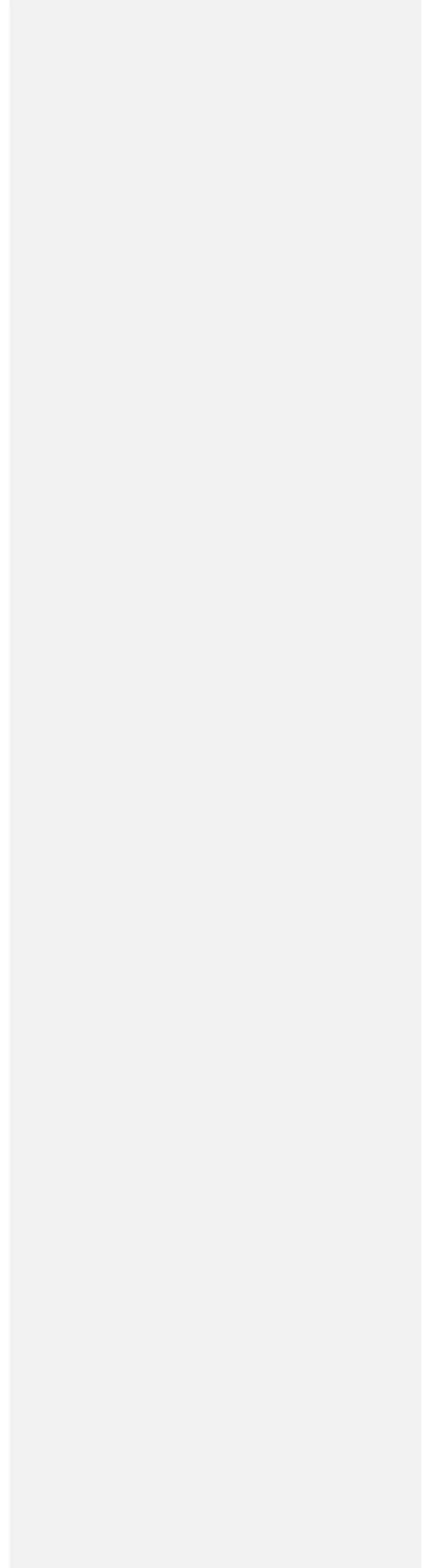
## **Natural Support**

A natural support is a support that is provided by a friend or family or community resource. *Natural supports do not involve payment.* They are provided by someone at no cost. There are two general sources for natural supports:

- Some natural supports are provided to the **individual**, by someone like a **relative, neighbor or friend** who wants to help – out of a spirit of friendship. For example, offering to drive someone to the store once a week is a natural support.
- Other natural supports are **general community resources** or activities, available to everyone in a community. For example, your local city recreation center is a natural support. These supports may come from many sources: local government, religious organizations, civic clubs, non-profit agencies, places of employment and more. For example: *Your school-age child goes to the neighborhood recreation center after school to participate in a youth sports program. Or, your young adult goes shopping at the mall with her neighbor once a week.*

Both of these activities are open to the general public (unlike “special” programs limited to people with disabilities). Natural supports are important because they provide for *inclusion*.

*By using natural supports, people with disabilities are included in the everyday activities available to and enjoyed by anyone in the community. Natural supports can save money.*



## **Paid Support**

**A paid support is a service provided by a professional, an agency or a company for a fee.**

Usually, these are special services that need to be provided or supervised by a qualified professional.

This type of support includes a wide range of services – medical care, personal care, therapy and much more. But again, it shares the same objective as other supports: helping someone to reach a goal related to home, work/school or personal/social aspects of their life. For example:

*Your school-age child receives services from a physical therapist. Or, a paid assistant comes into your home to help you care for a family member with a disability.*

## WHAT IS A SUPPORT PLAN?

A Support Plan is the record that describes the individual's goals or outcomes and lists the supports needed for them to be reached.

In a way, a Support Plan is a *personal roadmap*: it shows where individuals want to go, how they'll get there and the things they would like to do along the way.

The Support Plan is developed by the individual, with guidance from the support coordinator and others.

A Support Plan begins with basic information about the individual: preferences, interests, talents, attributes, needs and wants. Then it lists the individual's goals or outcomes. Finally, it describes the supports and services that will be needed, who will provide them, how and when.



### **A Support Plan ~~Is:~~**

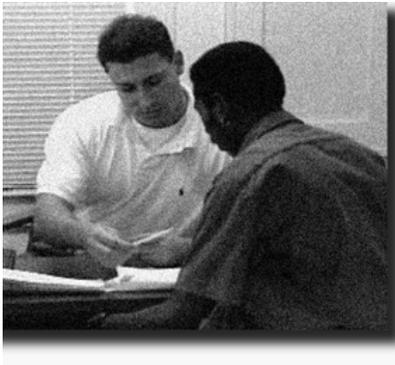
- Written by the individual, the support coordinator and (as appropriate) the family or guardian, and invited others.
  - A shared record for the person, family and those people involved in providing supports and services.
  - A description of services and supports that may be provided.
  - A practical plan of action for reaching goals or outcomes.
  - An inventory of the person's wants, needs, likes, dislikes, abilities and other helpful information.
  - An inventory of resources, within and outside of Developmental Services, in the community at large – which can or may provide support.
- A document that is changed as needed.

### **A Support Plan ~~IS NOT:~~**

- A guarantee that specific supports or services will be provided. Rather it outlines the ideal – what would need to be provided to reach the identified goals.
- A guarantee that funds will be available to provide the identified supports and services.

- A detailed case management record nor a collection of assessments and evaluations. It is a flexible, active plan. Since needs and abilities change, the Support Plan can be changed as needed

## WHAT IS A SUPPORT COORDINATOR?



Support coordinators are a lot of things: professionals, employees, good listeners, organizers, advocates, and problem-solvers – just to name a few. In the next section, this handbook goes into great

detail describing the role of the support coordinator. Here, we give you an overview.

Support coordinators are paid professionals responsible for helping plan, develop, coordinate and monitor supports and services.

### **Overall, support coordinators are:**

- Professionals who enter into a partnership with individuals and their families to plan, identify, get, monitor and evaluate supports and services.
- Knowledgeable resource people for individuals and families.

- Experts and advocates who monitor effectiveness of consumer satisfaction, and who facilitate changes as needed.

It's the support coordinator's job to learn about the individual and family, help them identify goals or outcomes that are important to the individual, and then help them secure the supports and services to reach those goals.

## **THE RELATIONSHIP BETWEEN THE INDIVIDUAL, FAMILY AND SUPPORT COORDINATOR**

**The relationship can be described in three ways:**

- ***Business Relationship*** – It's a business relationship, governed by the rules of good business: treating each other fairly and courteously; encouraging and respecting opinions; maintaining good communication; making expectations clear; performing job-related requests in a timely manner; accepting constructive criticism; and, terminating the relationship when the employer is not satisfied with the worker's performance.
- ***Partnership*** – Next, it's a partnership between the individual and the support coordinator. Each has rights and responsibilities he or she brings into the partnership. Both parties in the partnership are working toward the same objective: securing supports and services to achieve an outcome.
- ***Personal Relationship*** – Last, and certainly not least, it is a personal relationship. The support planning process involves an open and honest talk about the person's dreams and goals, failures and successes, capacities and barriers. These are topics most of us would consider private, even intimate. There needs to be a bond of trust and respect between people who care about one another's well-being. Anything less weakens the process.

## **SUMMARY**

This section was intended to help you get your feet wet. It introduced you to some of the key elements in support coordination: the support plan, supports, outcomes, and support coordinators.

Now it's time to dive in deeper.

### SECTION 3

## THE SUPPORT COORDINATOR'S JOB



### INTRODUCTION

In this section we'll look at what's entailed in being a support coordinator.

The overall role of the support coordinator is to assist people who have developmental disabilities to "live everyday lives." There are three types of support

coordinators in Florida: **Waiver Support Coordinators, Developmental Services Support Coordinators, and Contract Support Coordinators.**

### Types of Support Coordinators

The type of support coordinator someone has is based on whether services are being paid for by the state or "under the waiver" ( see page 6, bottom).

- **Waiver Support Coordinators** are private individuals who are paid to provide support coordination services to people enrolled in the Developmental Services/HCBS or Medicaid Waiver. They cannot work with more than 40 individuals at once. They may work on their own, as sole practitioners, or they may work for an agency that has a staff of support coordinators.

- **Developmental Services Support Coordinators** are state employees who work in District Offices providing support coordination services to individuals not enrolled in the waiver. There is no limit on the number of people they can serve.

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- **Contract Support Coordinators** are private professionals under contract to provide support coordination services to people not enrolled in the waiver. The private support coordinators may work on their own, as sole practitioners, or they may work for an agency that has a staff of support coordinators.

Support coordinator job qualifications are summarized in the Attachments (Attachment 2).

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### **GENERAL RESPONSIBILITIES AND REQUIREMENTS**

State and federal law includes some very specific job responsibilities for Waiver Support Coordinators. Developmental Services and Contract Support Coordinators (non-waiver) are also expected to meet most of these requirements. However, the large number of people they serve affects their ability to consistently provide this level of attention.

\*Means a responsibility is unique to Waiver Support Coordinators.

**Support Coordinator responsibilities include, but are not limited to, the following. (use this for reference):**

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- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• <b>Advocacy</b> – Advocate for the individuals receiving services and provide information to help make informed choices.</li> <li>• <b>Application</b> – Complete paperwork for determining that people are eligible for services.</li> <li>• <b>Assurances</b> – Waiver Support Coordinators must sign "Assurances" that spell-out their job responsibilities. (Many of those requirements have been summarized</li> </ul> | <p>here. However, a copy of the full document, Assurances for Support Coordination Providers under the Developmental Services Home and Community-Based Services Waiver, is available, from the District.)*</p> <ul style="list-style-type: none"> <li>• <b>Caseload</b> – Each Waiver Support Coordinator can serve no more than 40 individuals, even when the total includes people who are not clients of developmental services. There are no caseload limits for</li> </ul> |
|--|---|

state-employed support coordinators.\*

- **Communication** – Ongoing communication with the individual and, if appropriate, the individual’s family or guardian, to determine if individual’s needs and expectations are being met.
- **Community Inclusion** – Create opportunities that involve the individual in community life and promote friendships and associations based on the person’s interests and preferences.
- **Conflict of Interest** – Support coordinators must remain free from circumstances that interfere with the individual’s choice of supports and services. Support coordinators can not excessively influence an individual to request a support or service, select a specific support or service provider, or participate in an activity. Support coordinators are not allowed to:

\*✓ Provide other direct services;

\*✓ Be the guardian of a person;

\*✓ Be named the beneficiary of life insurance;

\*✓ Provide support coordination services to their family members;

✓ Purchase services from their family members

- **Coordination – Interagency** – Provide interagency and interprogram coordination to services. This includes working with Supervised Living and Supported Employment Coaches. It improves access to supports and services.
- **Eligibility** – Assist with maintaining eligibility for other benefits and resources such as Medicaid, SSI, Medicare and food stamps.
- **Emergencies** – Notify the district of any emergencies including hospitalization situations involving law enforcement, concerns about abuse and other significant incidents.
- **Facility Visits** – Monthly visits are made by district staff to all homes licensed by developmental services to ensure the facility

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is operating according to standards.

- **Freedom of Choice** – Waiver Support Coordinators must comply with federal regulations governing Medicaid Waiver Services that provide for freedom of choice within the scope of available funding levels.\*
- **Living Arrangements** – Assist the person to obtain the necessary health and safety supports and services when making a transition from one living arrangement to another, prior to the person moving into the new living arrangement.
- **Meetings** – Meet with the individual at his or her request or when there is a need to meet.
- **Money Management** – Responsible for managing and monitoring the individual's budget, making sure funds are being used in the most cost-effective way.
- **Monitoring Services** – Monitor purchased services to make sure they:
  - ✓ Meet the individual's expectations;
  - ✓ Are age and culturally appropriate;

- ✓ Address the need for which they are intended;
- ✓ Provide appropriate challenges, motivation and experiences to meet the stated outcomes; and
- ✓ Are delivered in a manner that protects the health, welfare and dignity of the individual.
- **Monthly Contacts** – Waiver Support Coordinators are required to have at least one face-to-face contact with the individual each month. At least once per quarter, the monthly face-to-face contact must occur in the person's home. The individual or family can waive the home visit, but the monthly face-to-face meeting must still occur. The face-to-face contact must relate to or accomplish one of the following:\*
  - ✓ Assist the individual to reach outcomes on the Support Plan, including gathering information to identify outcomes;
  - ✓ Monitor the health and well-being of the individual;
  - ✓ Obtain, develop and/or maintain resources needed or requested by the individual to

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include natural supports, generic community supports and other types of resources;

- \*✓ Increase the individual's involvement in the community;
- \*✓ Promote advocacy or informed choice for the individual; and
- \*✓ Follow-up on the individual's or family's concerns.

- **Monthly Activity Required – Other** – Waiver support coordinators must conduct at least one other support coordination activity every month. The activity must directly relate to implementing the outcomes in the Support Plan or must be to conduct a support coordination service (not an administrative or management activity, e.g., letter writing or billing). These additional contacts or activities may be either with the individual or with other persons (family, service providers, community members). May be conducted in person or over the phone.\*
- **On-Call** – Support coordinators are on-call

24 hours a day, 7 days a week.

- **Outcomes** – Support coordinators are expected to coordinate all activities necessary to assist each individual achieve or make progress toward the outcomes identified on the Support Plan.
- **Payment** – Waiver Support Coordinators are paid a fixed monthly fee for each individual they serve.\*
- **Privacy** – Support coordinators must keep personal information private. They cannot release information about an individual receiving services, as prohibited by state and federal law, without written permission from the individual or the individual's guardian.
- **Rates** – The support coordinator may be responsible for conducting rate negotiations with providers of supports and services on behalf of the individual and family. In some districts, district staff negotiate the rates rather than support coordinators.
- **Reports** – The support coordinator must

complete an annual report that describes the progress that has been made toward achieving the outcomes in the support plan.

- **Selection By The Individual** – Waiver Support Coordinators must accept all individuals who select them for support coordination services. They can request certain limits. For example, a support coordinator may choose to serve less than 40 individuals or request a specific geographic location.\*
- **Support Planning** – The support coordinator is responsible for completing the Support Planning Information Form; guiding the individual and family in developing the Support Plan; developing the Cost Plan; implementing, updating and monitoring the Support and Cost Plans.
- **Supports and Services – The Support Coordinator**
  - ✓ Assist the individual in using family, neighborhood and community supports and services funded by private, city and

county sources, prior to seeking services funded by federal and state sources.

- ✓ Assist the individual in using Medicaid state plan services prior to seeking services funded by the waiver.
- ✓ Find waiver-service providers who meet the needs of the individual.
- ✓ If necessary, he or she must recruit providers and assist them.

- **Provider Related**

**Responsibilities**

- ✓ Meet with providers to discuss the outcomes to be achieved with their service.
- ✓ Conduct rate negotiations with provider in order to get the most cost-effective services available for the individual.
- ✓ Meet with providers to discuss the individual's progress, if the individual's needs and expectations are being met and any need for change.

**Also, please see Attachment 10, SELECTING PROVIDERS, in the back of this handbook.**

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## WHO MONITORS SUPPORT COORDINATORS?



### **Waiver Support Coordinators**

The Developmental Services Office evaluates and monitors Waiver Support Coordinators.

The evaluation is done at least once a year using something called *The Developmental Services Waiver Support Coordination Process Monitoring Instrument*.

The monitoring process is very thorough and looks at these areas: Completion of Support Planning Information, Completion of the Support Plan, Completion of the Waiver Eligibility Work Sheet, Completion of the Cost Plan, adherence to the Cost Plan, progress notes on support coordination services, timely updates, cost control, professional practices and more.

The support coordinator is required to get a set score in these areas. If the required score is not received, the support coordinator must implement a Quality Improvement Plan. If services do not improve under this plan, the support coordinator can be removed from the program.

This is a public record and may be reviewed by an individual, family member or guardian prior to selecting a prospective Waiver Support Coordinator. However they are full of technical/professional terms. You will probably need help from the District to understand the importance of the findings.

### **Non-Waiver**

*Developmental Services Support Coordinators* are evaluated under the State of Florida's employee evaluation system.

*Contract support coordinators* providing non-waiver services are evaluated under the terms of their contract, which often include the same measures as the monitoring instrument.

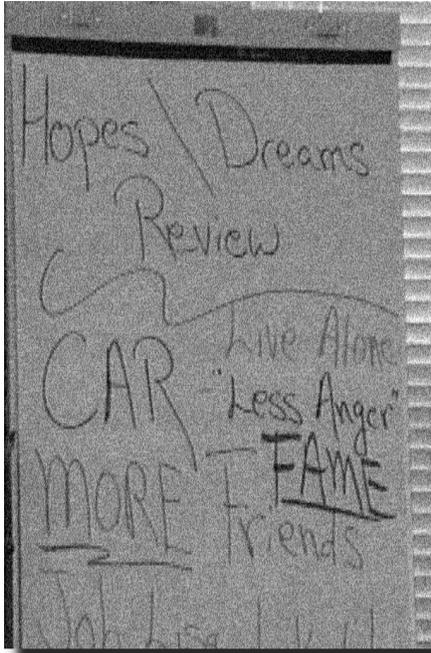
### **SUMMARY**

This section reviewed some of the chief responsibilities of the support coordinator's job. Overall, the most crucial responsibility of a support coordinator is establishing a trusting and balanced relationship with the individual and the individual's family or guardian.

In the next section we'll look at the support coordinator's most important responsibility – the support planning process.

## SECTION 4

# THE SUPPORT PLANNING PROCESS



### INTRODUCTION

This section of the handbook will help you understand how the support planning process should work. Understanding the process will help you to work better with your support coordinator. Also, this information will explain the activities your support coordinator is responsible for in the support planning process.

This section does not address every aspect of the process, nor would you want it to. There are many administrative aspects. Rather, the emphasis here is on what your support coordinator is required to do, and how these things should be done.

### KEY STEPS IN THE SUPPORT PLANNING PROCESS

The support planning process is person-centered. This means that the individual directs the planning. The support coordinator is involved as a resource, a facilitator and as an administrator of the plan.

Some of the steps in the process call for the active involvement and direction of the individual, the individual's family members or guardian along with the support coordinator. Other administrative steps need only involve the support coordinator, service providers and/or Developmental Services.

There are five key steps in the support planning process:

1. **Information Gathering**
2. **Conducting the Support Planning Meeting and Writing the Support Plan**
3. **Developing A Cost Plan**
4. **Authorizing Services**
5. **Updating A Plan**

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## 1. INFORMATION GATHERING

The support coordinator's first responsibility in the support planning process is to gather information about the individual.

The information will be used to help write the Support Plan and shape the approach to supports and services.

Information is gathered by reviewing records, talking to providers, talking to people who know the individual, observing the person in his or her environment, and visiting the individual and the individual's family or guardian.

The support coordinator records this information on a **Support Planning Information Form**, which becomes a part of the individual's central record. (A copy of this form is included in the Attachments (Attachment 3). This form must be completed before the Support Plan is developed.

### Information Gathering By The Support Coordinator (What They Need To Know)

- |                                      |                             |
|--------------------------------------|-----------------------------|
| ✓ Present situation                  | ✓ Existing Natural Supports |
| ✓ Capacities or abilities            | ✓ Existing Paid Supports    |
| ✓ Behaviors                          | ✓ Goals                     |
| ✓ Health Status                      | ✓ Living Arrangements       |
| ✓ Medications                        | ✓ Daily Activities          |
| ✓ People Important to the Individual | ✓ Community Involvement     |

To gather information the support coordinator will talk to family, friends and providers. He or she will probably make several informal visits with the person/family. In these interviews the support coordinator will use a process called **Personal Outcome Measures** for information gathering. This helps the participants learn what personal measures are present in the individual's life.

**Prepare for your part in the information gathering process by using the *Information Gathering Worksheet***

**included as Attachment 4. More information on Personal  
Outcome Measures is included in Attachment 4B**

## 2. THE SUPPORT PLANNING MEETING AND WRITING

### THE PLAN

#### *The Support Plan Meeting*

Once information has been gathered, a **Support Plan Meeting** is scheduled.

This meeting will involve the individual, the support coordinator and the individual's parents or legal guardian. **The individual decides who he or she wants to attend the meeting (family, friends or providers).**

During this meeting the individual will have a chance to talk about his or her goals and dreams. Then the individual and other participants will identify the supports and services needed to help reach those goals. ~~The process might take more than one meeting.~~

The purpose of this meeting is to develop the **Support Plan** – or to develop as much of it as possible with the information in hand.

The meeting is held in a relaxed and comfortable setting, at a time and place picked by the individual. Possible places:

#### **Where To Have A Support Planning Meeting**

- |                                     |                                      |
|-------------------------------------|--------------------------------------|
| ✓ The individual's home             | ✓ A neighborhood center              |
| ✓ The home of a relative or friend  | ✓ A local park                       |
| ✓ The individual's workplace        | ✓ A favorite restaurant              |
| ✓ The individual's place of worship | ✓ Anyplace the person is comfortable |

In addition to the individual, the parents or guardian and the support coordinator, other people may be invited to attend. The individual can invite anyone who is important to, and involved in, his or her life. For example:

**Who Should Participate in the Meeting**

- |                 |                              |  |
|-----------------|------------------------------|--|
| ✓ Family member | ✓ Teachers                   | ✓ Supervised Living Coach  |
| ✓ Co-workers    | ✓ Providers                  | ✓ Dept. of Education and VR Representative (if the individual has one) |
| ✓ Friends       | ✓ Advocates                  |  |
| ✓ Neighbors     | ✓ Supported Employment Coach |  |
| ✓ Clergy        |                              |  |

The support coordinator will help the person invite the people and make sure they know the date, time and location. If needed, the support coordinator will arrange for an interpreter.

**☐ The Support Coordinator's Role During the Meeting**

The support coordinator is expected to be a resource person, a facilitator, a mobilizer, a mediator, an advocate and a good listener. He or she will help the individual *identify wants and needs, and translate them into outcomes and activities.*

**The support coordinator will also:**

- Make sure everyone understands the process.
- Make sure that everyone understands the full range of choices.
- Explain the information needed and from whom.
- Review rights and the appeal process.

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- Encourage discussion and resolve any conflict.
- Make sure everyone participates in discussions.
- Share knowledge and expertise about services and approaches.
- Contribute to brainstorming.
- Record information on the Support Plan forms.

### ***The Individual's Role During the Meeting***

The individual directs the meeting, with guidance from the support coordinator and the parents or guardian. They need to be ready to discuss:

- The individual's goals – and dreams – for the future.
- The person's interests and preferences.
- The person's capacities, skills, talents, and communication style.
- His or her present situation in relation to life areas, including residence, work or school, and personal or social life.
- The individual's wants and needs for these same life areas.
- The individual's health status, including medications.
- The people and places in the community that have become a part of the individual's life.
- The individual's wants and needs stated as outcomes.
- The supports and services that might be needed to achieve those outcomes.
- Resources and informal or family supports that may be available through family, friends, neighbors and associates.
- Natural supports or generic and community resources that will help the individual to live and participate fully in the community.
- Paid supports and services that might be needed to achieve outcomes for the individual.

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### **Other Participants' Roles During the Meeting**

Family, friends, providers and others are there to:

- Offer their personal insights about the individual's wants, needs, skills and capacities.
- Help provide insight into the individual's personality, preferences, likes and dislikes.
- Serve as a resource person in their particular area of expertise or knowledge.
- Help identify natural and informal supports, as well as other community resources that can help individuals reach their goals.

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### **What You Should Expect**

You should expect a friendly and positive atmosphere. The meeting should be an open, thorough discussion – a brainstorming session for planning the future. Ideally, the meeting will result in everyone agreeing on what's to be done, by whom, when and how.

*When possible, the support coordinator will get you a copy of what was written during the meeting. If it is not possible to get all the details completed during the meeting, you will be asked to review and sign the support plan as soon as it is completed. The final copy of the support plan must be provided to you within five working days of the effective date of the plan.*

The person receiving services may decide that he or she would like to have a group of interested and involved people meet regularly. The group would meet to review progress, changes and options. This type of group is referred to as a **circle of support**. Your support coordinator or the District Developmental Services Office can provide you with detailed information about how to start a circle of support and how they work.

**Something To Remember:** Meetings to revise and add to a support plan can be held anytime – at the request of the individual – as needs or resources change.

## What's Included in a Support Plan

The Support Plan must follow a simple format. The support coordinator writes it up on special forms. Look at the illustration below and the sample form included in the Attachments. You can see that the plan is *organized by outcomes*:

SUPPORT PLAN  
Page \_\_\_ of \_\_\_

Support Plan Development Date: _____	Name: _____	
Support Plan Effective Date: _____	SSP: (Y/N)	(First) (MI) (Last)
Updates: _____	SSP: _____	
Outcome: What do you want/need to happen in your life? (What do you want to accomplish?)		
Strategies: Supports (variety of people, supports and opportunities to achieve the outcome) and Services Requested (Who's responsible? How will this be accomplished? Include frequency, intensity, duration, location)	Scheduled Review Date (When is review needed?)	Actual Review Date/Status (When was the action/support/service completed? What is the status—what does it happen now?)

Page A  
\*Use additional sheet as necessary

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- **Effective Date** – An effective date is set for the entire plan, as well as the time for updates.

- **Outcome** – Each outcome or goal is stated in easy to understand language.

- **Supports** – The actions, supports, services and resources needed to achieve each outcome are described.

- **Responsibilities** – The people and agencies responsible for each action, support, service and resources are identified; the intensity and frequency of the support; and, prospective funding source.

- **Review Dates** – A review date is specified for each activity.

- **Status** – The plan includes a place for the support coordinator to report on the status of each



The Cost Plan must be submitted to the District Developmental Services Office, and acted on, before the Support Plan goes into effect. Those individuals who are not enrolled in the waiver may or may not have a Cost Plan. It depends on the district.

However the district must still review and approve costs for the services identified for these individuals.

***This is a critical step in the support planning process.*** All supports are included in the cost plan – whether or not there is a cost for the support.

Further, the Cost Plan shows what funding source is being requested to pay, if there is a cost for a support or service. In that sense, ***the cost plan is a request to the District for funds*** to be used for the paid supports included in the Support Plan.

***If funding for a paid service or support is not approved, it will not be provided .*** Unless:

- An alternative resource for the support can be located, such as a different funding source or a no-cost community resource, or
- The support can be funded in a smaller amount than requested, or
- Funds become available in the future.

## About Funding

Unfortunately, lack of funds can have a significant impact on the way support planning is implemented. This situation can affect both waiver and non-waiver individuals.

Funding for supports and services depends on the amount of money annually provided by the Legislature, the amount received by your district and the amount of money available to pay for Waiver services. Districts generally allocate their funds based on who is eligible and who has the greatest need.

***Waiver or non-waiver, unfortunately there is never enough money to meet all the needs of all the individuals in Florida eligible for Developmental Services.***

## When Funds Are Not Available for Proposed

- Waiver Support Coordinators may need to negotiate with the District regarding funding of paid supports. You can expect the support coordinator to present and argue for the individual's case. But if there aren't any funds, there may be little he or she can do except look for alternative approaches.
- The support coordinator needs to allow for time in the process for these negotiations. Support Coordinators have been advised that it might be necessary to begin the approval process two months before the effective date of the Support Plan.
- Sometimes support coordinators will go back to the individual and, if appropriate, the family to take a look at priorities. The purpose will be to look at what's most important if funds are short. The individual may have to choose one activity over another, or a lesser amount of services.
- And keep in mind that Cost Plans can be changed. During the year, support coordinators can continue to request funding for a needed service.



## **RIGHT TO APPEAL DECISION**

If you are unhappy with the approved Cost Plan or with any aspect of service delivery:

- **First discuss it with your support coordinator.** Part of his or her job is to see if there is a better way to use the money available. You may have to choose one support over another.
- If you are still unhappy, you can and should **request a meeting with the District Developmental Services office.** Each district has a process for handling appeals. Request a copy from the District before the meeting. A list of District Supervisors is included in the Attachments.
- Finally, if you are still dissatisfied **you can request an Administrative Hearing** as provided by Florida Law. Individuals who receive developmental services have a right to appeal agency decisions, and request a hearing. In addition, individuals who receive services under the waiver can request a hearing. Attachment 14 provides additional information on the hearing process. Requesting a hearing would most likely require the help of a lawyer. If you do not have a lawyer, you may want to contact your local Legal Aid office. For additional guidance, you may want to contact the Center for Advocacy For Persons With Disabilities in Tallahassee (1-800-342-0823).

**Additional information on Due Process and Appeals is included in Attachment 12. Specific questions and answers regarding requesting a hearing are also included in this attachment**

Also in the Attachments, Attachment 13 includes a list of names, addresses and telephone numbers of people who might be able to help in the event of a problem.

#### **4. AUTHORIZING SERVICES FROM A PROVIDER**

After the District has approved the Cost Plan, the support coordinator must contact each person or agency that will be providing supports or services.



- The support coordinator must make sure that each selected provider understands the type and amount of service they will be providing.
- To do this, the support coordinator sends a Service Authorization form to the providers. This form lists the service, start date, how often it will be provided, for how long and the authorized payment. The provider cannot begin services until the form is received.
- In turn, most providers must prepare an Implementation Plan. The Implementation Plan explains how the provider will deliver the service and how the service will help achieve the related outcome in the Support Plan.

***These forms are very important safeguards and could be helpful in the event of a problem with a provider.*** They will indicate: a) whether the provider got the right instructions; and/or b) whether they are delivering what was promised. You have a right to review both of these forms.

## 5. UPDATING A PLAN

Support Plan and Cost Plan updates can be requested at any time by the individual, or by others, with the approval of the individual or guardian. An individual will want to request an update if:

- Outcomes need to be changed or revised;
- Actions, supports or services need to be changed; or
- You want to change providers.

If the Support or Cost Plans for the individual are updated, be sure you get a copy of the changed sections.

### SUMMARY

We hope this section has given you a good overview of the support planning process. It does not cover everything involved in the process. A number of administrative activities were omitted – even though they are a very time consuming part of the support coordinator's job. Covered were those things that would probably be most important to the individual and a parent or guardian as they work with a support coordinator.

*If you are reviewing this handbook for the first time, now would probably be a good time to take a break.*

*We've covered a lot of material and you may want to go back and review some of it.*

As you go back and review, make some notes concerning your opinions about the person you represent:

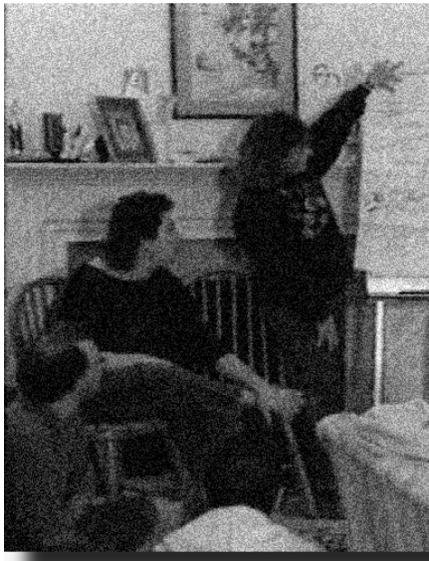
- What supports are needed?
- What natural supports are available in our community?
- Who should be at the planning meeting?
- Is the current support plan accurate and up to date?
- Is our support coordinator meeting the responsibilities of the job? If not, what's the problem?

**The Information Gathering Worksheet** (Attachment 4) can be helpful for this review. Remember to make a copy if you will also need it to prepare for the Support Planning Meeting.

If you feel you need more information about support planning, tell your support coordinator. Detailed information on being a support coordinator is included in the *Support Coordinator Guidebook* published by the Developmental Services state office. The guidebook is a public document available for your inspection. But be forewarned, it's about two inches thick and the important parts have been summarized in this handbook.

## SECTION 5

# SELECTING A SUPPORT COORDINATOR



### INTRODUCTION

Selecting a support coordinator is the first step – and one of the most important steps – in the support planning process. This section looks at some of the things the individual receiving services needs to consider when making a selection. ***Individuals receiving services under the waiver select their own support coordinator. However, individuals who are not enrolled in the waiver will have a support coordinator designated by the District office.*** The person will be either a state employee or a contract support coordinator.

The information below is important whether or not an individual actually picks a support coordinator. It reviews things to consider in evaluating a person's skills and approach to the job. Selected or appointed, if a support coordinator does not measure up to the individual's expectations, he or she may want to request a change. *How to change support coordinators is covered in the next section.*

Tools to help you and the person you represent during the selection process are included in the Attachments. You will find *Support Coordinator Selection Checklist* (Attachment 5), *Sample Interview Questions* (Attachment 6) and *Sample Candidate Evaluation Form* (Attachment 7).



## **WHERE TO BEGIN**

Selecting a support coordinator is one of the first things an individual does after being enrolled for waiver services. The individual should approach this the same way someone would approach hiring a new employee. By and large, the support coordinator is the individual's employee.

### **WHO CAN HELP**

Just like hiring an employee, you'll want to get references and referrals. However, because of confidentiality rules, support coordinators will not be able to identify others they are serving (unless the individual or guardian says it's okay). Where can you get information on the support coordinators in your area?

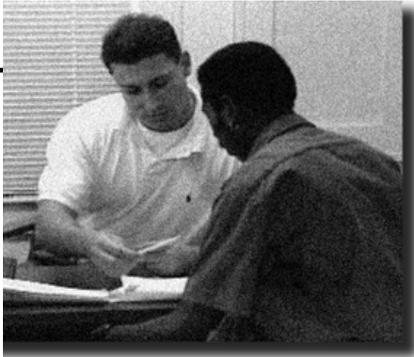
- ⊕✓ **Other Parents** – Talk to other parents. They can be a great resource. Ask them if they like their support coordinator and if they would they recommend this person?
- ⊕✓ **Organizations and Advocates** – Talk to people at the local ARC or other organizations involved in serving and advocating for persons with developmental disabilities.
- ✓ **Other Providers** – talk to service providers whose

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opinions you value. Ask if they have any recommendations. However, don't let anyone pressure you into choosing a particular person.

- ✓ **Developmental Services staff** – The District Developmental Services Office has a list of approved Waiver Support Coordinators.

### What You Can Expect from the District Developmental Services Office



□ District Developmental Services Offices are not allowed to influence your decision on whom you choose. The district can not show favoritism toward one provider over another. And staff members are prohibited from giving you a personal opinion; they can only share objective facts.

Ask for – If you have not been offered the following, ask for:

- \*✓ **Procedures** – Any *procedures* your District may have for selecting a support coordinator. Ask staff if there are any District procedures that may affect your selection process.
- ✓ **Background material** – is available on certified support coordinators. The

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District keeps current background information on these providers. Individual support coordinators and firms providing support coordination services will usually have an information sheet, brochure or flyer that briefly explains their qualifications and philosophy for services.

- ✓ **The Management Plan** – for support coordinators in whom you are interested. Every Waiver Support Coordinator is required to submit a Management Plan to the District Office. This plan includes the provider's mission statement, services, procedures and policies, safeguards for the individual's health and welfare, grievance procedures and more.

- \*✓ **Evaluation** – After you've narrowed down the list to several possibilities you may want to see the support coordinators' most recent evaluation, the *Developmental Services Waiver Support Coordination Monitoring Instrument*.

- \*✓ **Workshops**– Ask District staff if they have any workshops for meeting support coordinators and, if so, when the next one will occur.

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## WHAT DO YOU WANT IN A SUPPORT COORDINATOR?

Before actually beginning to talk to prospects, take some time to think about the type of person wanted by the person you represent. What type of person would work best with the individual? Who will he or she feel most comfortable with? It's not likely you would rule someone out for any one of these reasons. But here are things the individual making the selection might consider:

• **Personality Type** – Are there certain types of people the person receiving services gets along with better than others? Does he or she prefer someone who is:

- ✓ Assertive or deferring?
- ✓ Informal and personable or business like and professional?
- ✓ Detail oriented or more concerned with the "big picture?"
- ✓ Talkative or reserved?
- ✓ A fighter or a negotiator?
- ✓ Practical or idealistic?
- ✓ Highly involved or less meddlesome?
- ✓ An advocate or a resource for self-advocacy?
- ✓ A risk-taker or cautious?

• **Demographics** – You would never select someone based solely on their age, gender or ethnicity. But demographics might be a consideration. For example, a young female individual might prefer a female. Or the individual might prefer someone with a similar cultural background or someone closer to his or her own age.

• **Special Skills** – Do you prefer to have a support coordinator with special skills?

• ✓ **Language** – Would you prefer someone who is bilingual? Do you need someone who knows sign language?

✓ **Technology** – Do you use a computer for record-keeping? Would you prefer someone who does the

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same?

- ✓ Other skills unique to your needs or lifestyle.

This list, of course, could go on and on. The idea is to seek out someone with whom everyone involved will be comfortable.

## **THE SELECTION PROCESS**

### **☐ Waiver – Hiring a Waiver Support Coordinator:**

☐1. **Contact the candidates** whom you consider to be the most qualified or who come highly recommended. Remember that support coordinators can only serve up to 40 people, so you may have to contact several.

☐2. **Set up a time to interview the person.** It should be at a time and place convenient to the individual receiving services. Use the forms in the Attachments to prepare for the interviews and for notes about the candidates interviewed.

3. Feel free **to interview several people** before making a decision.

### **☐ Non Waiver – If You Are Assigned A Developmental Services Support Coordinator or Contract Support Coordinator:**

☐1. Even though the support coordinator is assigned, rather than hired, you have a right to know the person's qualifications, philosophy and approaches.

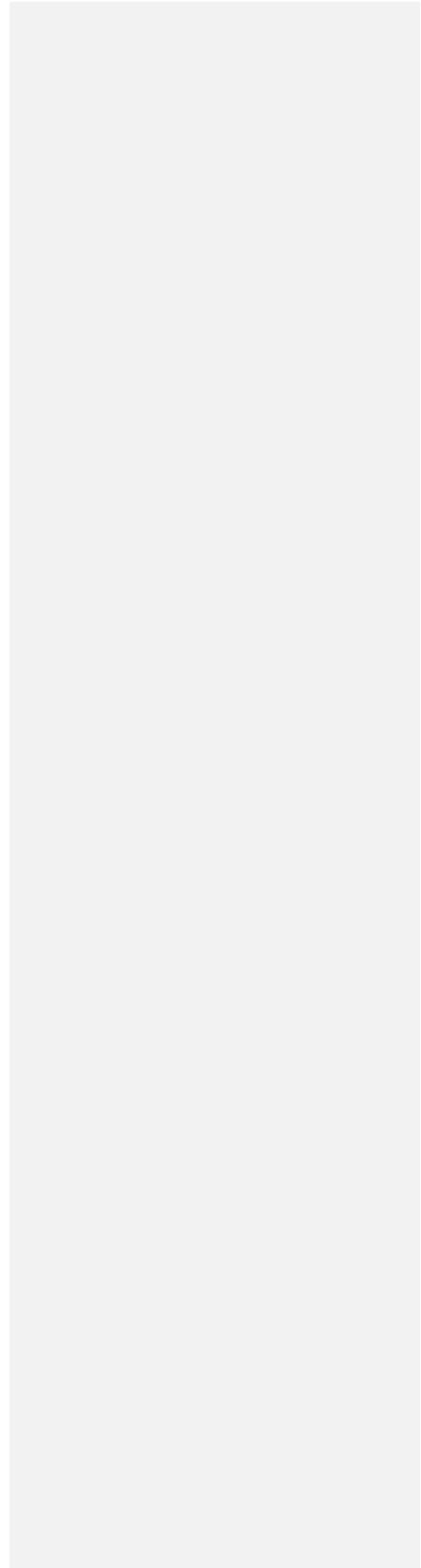
☐2. After you have been given the name of your support coordinator, contact the person and explain that you and/or

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the individual receiving services would like to meet to get acquainted and talk about their approach to support planning. At this meeting, you can to ask any questions from the list below.



## **THE INTERVIEW OR INTRODUCTORY**

### **MEETING**

- After making introductions, begin by briefly explaining what you and the person you represent are looking for in a support coordinator.
- Then proceed with questions from the list that follows.
- Before ending the interview, ask the candidate if there is anything else that has not been covered or if there is anything else he or she would like to say.
- For Waiver Support Coordinators, let the candidate know the timeframe for making a decision and how he or she will be notified.

## **Sample Interview Questions**

Following is a broad range of possible interview questions (or discussion topics). The list is long so choose those that are most important to you and the person you represent. *(These questions are also included in worksheets in the back of this handbook.)*

### **1. Professional Experience**

- How long have you been a support coordinator?
- What special education or training do you have for working with people with developmental disabilities?
- What experience have you had working with people with developmental disabilities?
- Do you have any experience working with an individual who has similar needs and capacities as the individual receiving services (or relative, friend or dependent)?

- Will you be the support coordinator working with us, or will it be someone else from your agency?
- If you leave your agency, how is a replacement handled? What happens until a new person is hired?
- Have you or your firm ever had a contract canceled by the District or been removed from a list of certified support coordinators because of poor performance?
- How was your last evaluation?
- Has there ever been an attempt to remove you from the program?

## **2. Philosophy**

- What does person-centered planning mean to you?
- In your opinion, what are the strengths and weaknesses of the support planning process?
- How would you explain the idea of choice in the support planning process?
- How would you explain the role of the support coordinator?
- How would you explain the idea of community inclusion?
- How would you explain the idea of informal or natural supports?
- How would you describe the relationship between the support coordinator and the individual and family?
- How would you describe the relationship between the support coordinator and other providers?

- How would you describe the balance between your role as an advocate and the individual's role as a self-advocate?
- How would you describe yourself, your personality?
- What do you like about being a support coordinator?  
Dislike?
- What do you think you uniquely bring to the job?
- What are your interests outside of work – hobbies and pastimes?

### **3. Service Delivery**

- On the average, how often do you have face-to-face contact with the individuals you represent?
- On the average, how often do you have telephone contact with the individuals you represent?
- How do you make yourself accessible to the people you represent?
- If I have an emergency on the weekend how do I contact you?
- What is the turn-around-time to answer a call?
- Can you provide some real world examples of what you consider to be outcomes?
- Can you provide some examples of how you facilitate community inclusion for the individuals you represent?
- Can you provide some examples of the types of natural

or informal supports you try to develop?

- How would you describe your connections to the community? How do you network for the purpose of identifying and securing resources?
- If we are unhappy with the service of one of our providers, how do you go about solving the problem?
- Do you have a good relationship with the District Office?
- What happens when the support plan is written, the cost plan has been submitted to the district, and district staff say there are insufficient funds for the needed supports and services? How do you handle this type of situation? What type of success have you had in these types of negotiations?
- Request a copy of their grievance procedure.

***All of these questions are included in Sample Interview Questions (Attachment 6) in the back of this handbook.***

### **EVALUATING A PROSPECTIVE SUPPORT COORDINATOR**

After the interview or meeting, the individual and the family or guardian need to evaluate the prospective candidate. Consider the following:

- ⊕✓      How did the person match up to the personal qualities wanted (i.e. special skills, personality type)?
- ⊕✓      Did the individual feel comfortable with the person? Did the candidate seem likeable, sincere and accessible?
- ⊕✓      Was the person a good listener?
- ⊕✓      Was the person enthusiastic about the job?
- ⊕✓      Was the person qualified? In addition to training and education, did the candidate sound competent,

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knowledgeable?

| ⊕✓ \_\_\_ Are the candidate's ideas about service – philosophy – consistent with yours?

| ⊕✓ \_\_\_ Did you agree with the candidate's approach to services?

| ⊕✓ \_\_\_ Did the person offer any unique or creative approaches?

| ⊕✓ \_\_\_ Can this person represent your best interests?

| ⊕✓ \_\_\_ Are their grievance procedures clear and fair?

Use the *Sample Candidate Evaluation Form* (Attachment 7) for evaluating the people you interview.

## **SUMMARY**

Without a doubt, there is a wealth of competent and qualified support coordinators in the state of Florida – working as sole practitioners, working with agencies or employed by Developmental Services. In the end, you may find that the individual receiving services has a choice between equally qualified candidates, and the selection may come down to a matter of personality and style.

To be a support coordinator, takes a commitment and dedication to humankind found in few professions. Be free with compliments if you are pleased with their services. They deserve respect, cooperation and admiration for choosing such a challenging profession and for affecting positive change in people's lives.

## SECTION 6

# CHANGING SUPPORT COORDINATORS



### INTRODUCTION

The person receiving services can change support coordinators with a phone call, but that's not something he or she would want to do without trying to resolve the problems first. Changing support coordinators is not something to do lightly. Individuals enrolled in the waiver can change support coordinators whenever they want for any reason. Individuals not enrolled in the waiver can request a change. District Developmental Services Staff will do the best they can to accommodate the request.

### WHY WOULD SOMEONE CHANGE SUPPORT COORDINATORS?

Let's look at four reasons why individual might want to change support coordinators:

- **Performance** – The support coordinator's performance is not satisfactory. The support coordinator has not performed his or her job consistent with things covered in this handbook. This includes situations where the support coordinator has not done certain required tasks. It also includes situations where the tasks are done, but not done well. Failing to do one task or failing to do a few tasks to your satisfaction would not be grounds for changing support coordinators. However, repeated poor performance or no

performance is grounds for a change.

• **Personality Conflicts** – The individual receiving services and the support coordinator don't get along. This is a subjective – but valid – reason to change. There are a number of reasons why the person receiving services might feel this way. The support coordinator's personality or way of approaching things may be too different; the individual might dislike the way the support coordinator communicates; the individual may feel the person has an attitude problem – condescending, patronizing or disinterested. Or, there may just be a history of ongoing conflicts. There could be any number of reasons for people not getting along. However, there is one deciding factor for change: if this inability to work together is reducing the quantity or quality of services received by the person you represent, there's reason to change.

• **Philosophical Differences** – The individual may not agree with the support coordinator's approach to service delivery. Support coordination is based on a set of principles: *person-centered planning, individual choice, community inclusion, uses of natural supports*, for example. A support coordinator might approach these ideas differently than the individual receiving services. His or her approach might be too conservative – or too radical. If the individual is uncomfortable with the support coordinator's approach, and they can't agree on a common ground, it's time for a change.

•**Ethical or Legal Conflict** – This would apply in a situation where the support coordinator has acted in a unethical or illegal manner. After bringing this matter to the attention of the appropriate authority (i.e. the District Developmental Services office, local law enforcement, etc.), a change would naturally occur. However, a situation might occur where something is questionable but not clearly unethical or illegal. For example, you may feel your support coordinator has a conflict of interest relating to another provider, but the District or other governing authority doesn't see it that way. Is this reason to change? Maybe. If the issue has made the individual lose confidence in the support coordinator's judgement or values, change.

Should one or more of these situations occur, you would first want to try to solve the problem. If it can't be solved and the problem is ongoing, you should begin the process for making a change.

Every support coordinator is required to have a grievance policy and procedure. You should have a copy of that on file. The first time you have a problem, review the process to see if it offers a good approach for solving problems. It may offer you a quick way to handle an issue, especially if the support coordinator works for a firm.

## USING A FAIR PROCESS

Usually, before an employer terminates a worker, a series of steps are followed to make sure that both parties are treated fairly. A similar process should be used for changing support coordinators.

Nearly the same process would be used for terminating a Waiver Support Coordinator or asking that a non-Waiver Support Coordinator be changed.

Following is a sample process you may want to follow. However, no specific process is required.

### Step 1 – Meet with the Support Coordinator

- ✓ Set up a meeting with the person you represent and the support coordinator, specifically to discuss your concerns.
- ✓ Explain the issue at the meeting. Give specific examples. Listen to his or her explanation. Then, make the individual's expectations clear. Inform the person that if the matter is not resolved to your satisfaction, you will terminate his or her services. (Or you will request a new support coordinator if the individual is not enrolled in the waiver.)

- ✓ Set a time period to see if the problem has been solved. For example, you might decide to "wait-and-see" for at least 30 days after meeting.
- ✓ Set up a meeting to take place at the end of the evaluation period and invite the support coordinator's supervisor.

### Step 2 – Put It in Writing

- ✓ It never hurts to put a complaint in writing.
- ✓ After meeting with the support coordinator, you may want to follow up with a letter. In the letter summarize your concerns, the points discussed at the meeting, the evaluation period and state that the individual you represent will terminate

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services if the problem is not solved. (Or you will request a new support coordinator if you are not under the waiver.)

- ✓ A sample letter is included in the Attachments (Attachment 9).
- ✓ You may want to send a copy to the support coordinator's supervisor.

#### Step 4 – Follow-up Meeting

- ✓ If things do not improve, you can terminate the support coordinator or give the person one more chance.
- ✓ ***If you decide to try again, ask the support coordinator to set up a meeting*** with you, the person you represent, the support coordinator and the support coordinator's District Developmental supervisor or contract manager. If the support coordinator is with an agency or the state, his or her supervisor should also attend. Review your original concerns at this meeting.
- ✓ After (or during) the meeting, if you and the individual receiving services are satisfied the matter ***has been resolved***, talk with the supervisor and the support coordinator about how you can prevent future problems.
- ✓ After (or during) the meeting, if you feel the matter ***has not been resolved***, inform the support coordinator that his or her services are being terminated (waiver). Or, request that your support coordinator be changed (non-waiver).
- ✓ If the individual receiving services decides to terminate the support coordinator, you may want to put it in writing. A sample letter is included in the attachments (attachment 9).

- ✓ **Notify the District Developmental Services office** as soon as possible so the process of selecting a new support coordinator can begin.
- ✓ Developmental Services requires support coordinators to continue providing services until their replacement is prepared to take over.

### **SUMMARY**

The individual receiving services has the right to change support coordinators any time. This is a suggested process that has been reviewed and revised by individuals, parents, advocates and support coordinators.

Changing support coordinators is an important decision that should not be rushed.

SECTION 7  
**MAINTAINING A GOOD RELATIONSHIP WITH  
YOUR SUPPORT COORDINATOR**



**INTRODUCTION**

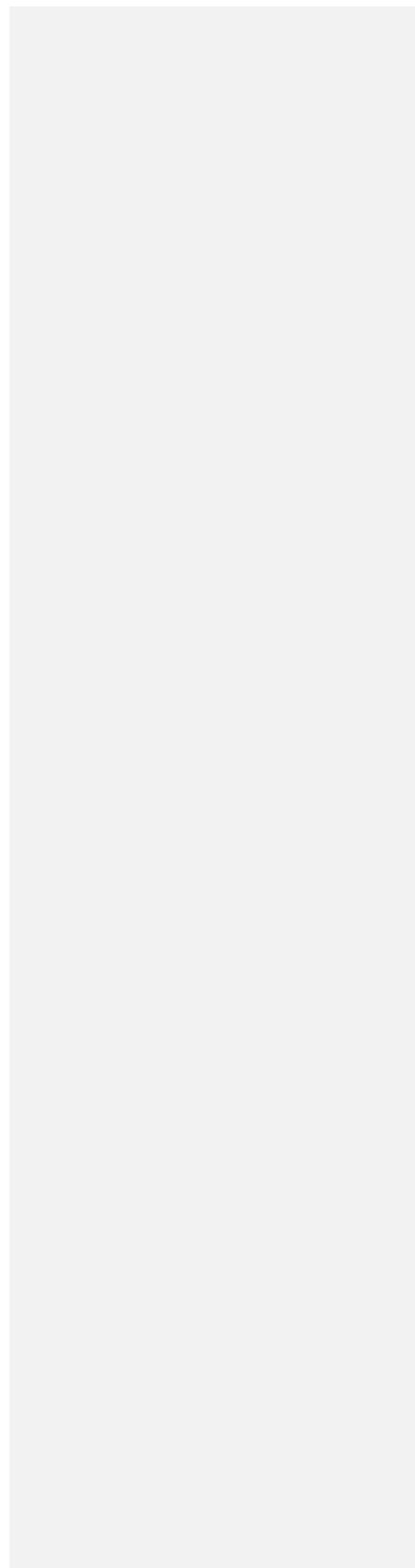
Maintaining a good relationship with your support coordinator is valuable and important. You are members of the same team, working in the best interests of the person receiving services.

Good relationships take time, energy and understanding from all the parties involved.

Good relationships also require the key ingredients of communication, honesty and mutual respect.

- **Communication** – You have to be able to talk – and listen – to each other. You need to talk, and exchange ideas, not just when there's a problem. All parties need to be available and accessible.
- **Honesty** – The relationship needs to be open and honest. All parties need be truthful in intentions, words and actions. Say what you mean, mean what you say and follow-through.
- **Mutual Respect** – You need to respect each other's perspectives and opinions. You have unique, first-hand experiences with the individual receiving services, and the support coordinator has professional experience and opinion. Both are equally important.

These three things offer a very simple way to begin building a good relationship. Of course, it will take more.



## SOME DO'S AND DON'TS

### Do:

- ✓ **Remember that the individual receiving services is the primary decision-maker.**
- ✓ **Get to know each other.** Get together and talk about philosophy, ideas, approaches and alternatives.
- ✓ **Give the support coordinator a chance to see you** and the person receiving services doing everyday activities, in his or her own environment.
- ✓ **Set ground rules** for a professional relationship:
  - **Availability** – When and how will he or she be available?
  - **What about after-hours and weekend contact?**
  - **What decisions will the support coordinator make on the individual's behalf?**
  - **How many contacts per month can the person receiving services expect?**
  - **What will be cleared in advance with the individual receiving services or the individual's representative?**
- ⊕✓ **Make expectations clear.**
- ⊕✓ **Ask questions** about anything that's unclear.
- ⊕✓ **Discuss problems** as soon as they occur.
- ⊕✓ **Notify the support coordinator** if the Support Plan needs to be changed.
- ⊕✓ **Let the support coordinator handle** provider billing and payment problems.
- ✓ **Let the support coordinator know** about provider problems.
- ⊕✓ **Enable the individual receiving services to problem-solve** as much as possible under the guidance of the support coordinator.
- ✓ **Use your best judgement when asking your support coordinator to intervene:** For example, a transportation provider fails to show up to take the individual to a scheduled program. It's not the support coordinator's job to find the individual a

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ride that day. However, it is the support coordinator's job to find out why it happened and what can be done to make sure it does not happen again. Or, if it does happen again, to find another provider.

- ✓ **Be patient.** The support coordinator is your liaison with a huge bureaucracy of state and federal policies, procedures and people. Some things are beyond his or her control. Also, some changes or requests take time to implement.
- ✓ **Compliment your support coordinator** when you are pleased with his or her performance.
- ✓ **Keep your support coordinator up to date.** Let him or her know if you are contacted by other agencies (e.g. Social Security Administration) or about any changes in the individual's life.

#### **Don't:**

- ⊕✓ **Don't expect your support coordinator to solve every day-to-day problem.**
- ⊕✓ **Don't hesitate to contact your support coordinator** when there is a problem with a provider's services, community resources or other areas where they can help.
- ⊕✓ **Don't let problems fester;** address them immediately with your support coordinator.
- ⊕✓ **Don't let your support coordinator persuade** you into anything that makes you uncomfortable. Seek a second opinion.
- ⊕✓ **Don't be silent** when something doesn't seem right. Speak up.
- ⊕✓ **Don't be afraid** to be assertive.
- ⊕✓ **Don't hesitate to contact a supervisor.**
- ✓ **Don't let your personal opinions** overshadow the support coordinator's professional view, but feel free to offer them.
- ✓ **Don't let one provider pit you against another.** It happens.
- ✓ **Don't get caught** in the game of "he said/she

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said." Go to the source and get the facts when there is a problem.

## **SUMMARY AND CONCLUSION**

There is no magic formula for a good relationship – with a support coordinator or anyone else. The ideas outlined above can help where the problem is clearly defined. However, the real challenge occurs when the cause or solution is unclear. That's when teamwork, partnership, reason and commitment to what's best for the individual needs to prevail.

We hope this handbook has achieved its goals: helping you better understand support coordination and providing you with information that will enable you to work better with the support coordinator serving the individual you represent.

If you have any questions about this workbook, please contact Ms. Susan Prater-DeBeaugrine, Florida Developmental Disabilities Council, 124 Mariott Drive, Suite 203, Tallahassee, FL, 32301-2981, 850-488-4180, FAX 850-922-6702, TTD 850-488-0956. If you have any comments or suggestions about the content of this workbook, please contact Pietrodangelo Production Group, 406 Timberlane Road, Tallahassee, FL 32312, 850-894-1210, FAX 850-894-2197.

## **ATTACHMENT 2. SUPPORT COORDINATOR QUALIFICATIONS**

### **Support Coordinator Job Qualifications**

**Education and Experience** – Minimum qualifications for being a support coordinator are a bachelor's degree and two years of professional experience in developmental disabilities, special education, mental health, counseling, guidance, social work, health or rehabilitation programs. (A master's degree may substitute for one year of required experience.)

Any person responsible for the supervision of a support coordinator, or a support coordinator applying for certification as a sole practitioner to provide waiver services, must have a bachelor's degree and three years of professional experience.

As employees in positions of trust and responsibility, support coordinators undergo a security background investigation. This includes employment history checks, fingerprinting, statewide criminal and juvenile record checks through the Florida Department of Law Enforcement (FDLE), federal criminal checks through the Federal Bureau of Investigation (FBI), and may include local law enforcement criminal record checks.

### **Code of Ethics (excerpts from Assurances for Waiver Support Coordination Services)**

#### **11.0 Ethical Practices**

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11.1 The provider shall market its services in an ethical manner. The provider agrees to the following:

- (a) The provider shall not possess or use lists or other information from any source that identifies persons receiving services from developmental services for the purpose of solicitation;
- (b) Other than support coordination services, the provider shall not offer goods, services or financial incentives to individuals, their families or other persons who could influence individuals or their families for the purpose of selecting the provider; and
- (c) The provider shall not solicit or influence, or recruit another person or service vendor to solicit or influence, an individual currently receiving services

from another support coordination vendor for the purpose of inducing the individual to switch providers.

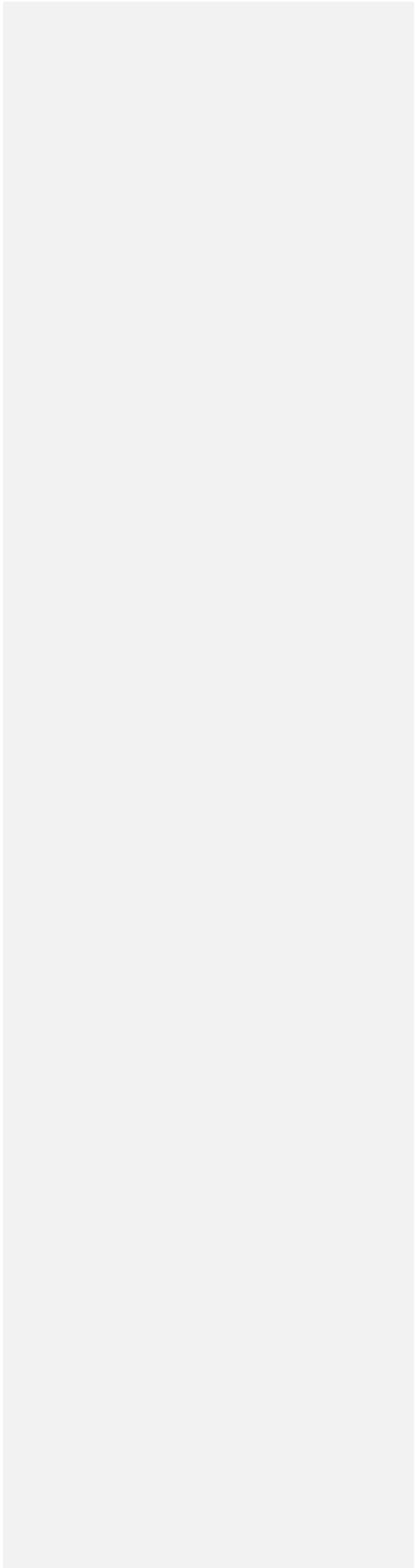
11.2 The provider understands and agrees that if, while serving an individual, the individual chooses another support coordination vendor, the provider shall render quality services to said individual until the end of the month when the transfer to the new support coordination vendor takes place. Additionally, the provider shall assist the individual in making a smooth transition to the new vendor.

#### **ATTACHMENT 4. INFORMATION GATHERING WORKSHEET: PREPARING FOR THE SUPPORT PLAN MEETING**

When the Support Plan meeting occurs, you will want to be prepared to talk about the past and future. Use this form to make some notes about the topics to be discussed:

<b>ITEM</b>	<b>NOTES</b>
What are the individual's goals – and dreams – for the future?	
What are the individual's interests and preferences?	
What are the individual's capacities, skills, talents, and communication style?	
What is the individual's present situation in relation to life areas, including home (where the person lives), work/school and personal/social activities?	
What are the individual's wants and needs for these same life areas?	
What is the individual's health status, including medications?	

<p>Who and what are people and places in the community that have become a part of the individual's life?</p>	
<p><b>State the individual's wants and needs as outcome statements, i.e., I want to be able to:</b></p>	
<p>1.</p>	
<p>2.</p>	
<p>3.</p>	
<p>4.</p>	
<p>5.</p>	
<p>The supports and services that might be needed to achieve those outcomes:</p> <p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p> <p>5.</p>	
<p>Supports that may be available through family, friends, neighbors and associates.</p>	



Other natural supports and community resources that can enable the individual to live and participate fully in the community.	
Paid supports and services that might be needed to achieve outcomes for the individual.	

If you are updating a plan, do you have a copy of last year's annual report? Last year's plan?



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**ATTACHMENT 5. SUPPORT COORDINATOR SELECTION  
CHECKLIST**

Use this to help organize information as you prepare to select a new Support Coordinator.

Names of Support Coordinators Recommended By Others:

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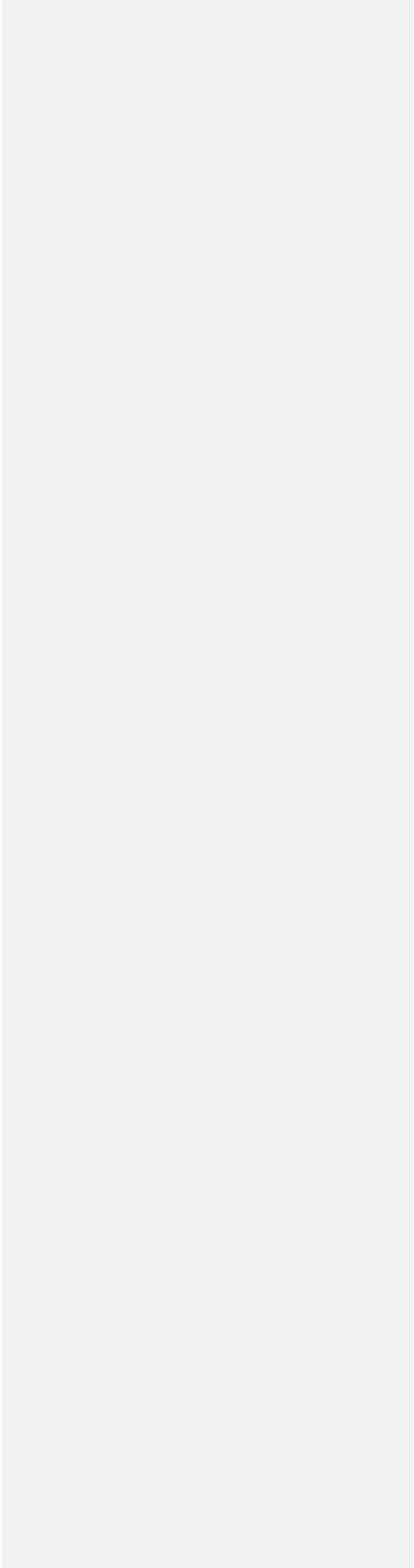
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**BACKGROUND MATERIALS FROM THE DISTRICT OFFICE TO REVIEW:**

- List of Certified Support Coordinators
- District Procedures for Selecting and Changing Support Coordinators
- Background Information from Support Coordinators (brochures, pamphlets, etc.)
- Management Plans for Finalists (list the names of the support coordinator or agency from whom you would like to see a management plan)
  
- Grievance Procedures for Finalists
- Annual Evaluation for Finalists (list the names of the support coordinator or firm)



## **ATTACHMENT 6. SAMPLE INTERVIEW QUESTIONS**

Make a copy of this form for each candidate you will interview. Circle the questions you want to ask. Make notes about their response.

### **Professional Experience**

#### **NOTES**

- How long have you been a support coordinator?
- What special education or training do you have working with people with developmental disabilities?
- Before this job, what experience did you have working with people with developmental disabilities?
- Do you have any experience working with an individual who has similar needs and capacities (as the individual receiving services)?
- Will you be the support coordinator working with us, or will it be someone else from your firm?
- If you leave your firm, how is a replacement handled? What happens until a new person is hired?
- Have you or your firm ever had a contract canceled by the District because of poor performance?
- How was your last evaluation?
- Has there ever been an attempt to remove you from the list of certified support coordinators?

### **Philosophy**

- What does person-center planning mean to you?
- In your opinion, what are the strengths and weaknesses of the support planning process?
- How would you explain the idea of

choice in the support planning process?

- How would you explain the role of the support coordinator?
- How would you explain the idea of community inclusion? Natural supports?
- How would you describe the relationship between you and the individual and family?
- How would you describe the relationship between the support coordinator and other providers?
- How would you describe the balance between your role as an advocate and the individual's role as a self-advocate?
- How would you describe yourself, your personality?
- What do you like about being a support coordinator? Dislike?
- What do you think you uniquely bring to the job?
- What are your interests outside of work – hobbies and pastimes?

#### **Service Delivery**

- On the average, how often do you have face-to-face contact with the individuals you represent? Telephone contact?
- How do you make yourself accessible to the people you represent?
- If I have an emergency on the weekend, how do I contact you?
- What is the turn-around-time to answer a call?
- Can you provide some real world examples of what you consider to be an outcome?
- Can you provide some examples of how you facilitate community inclusion for

the individuals you represent?

- Can you provide some examples of the types of natural or informal supports you try to develop?
- How would you describe your connections to the community? How do you network for the purpose of identifying and securing resources?
- If we are unhappy with the service of one of our providers, how do you go about solving the problem?
- Do you have a good relationship with the District Developmental Services office?
- What happens when the support plan is written, the cost plan has been submitted to the district, and district staff say there are insufficient funds for the needed supports and services? How do you handle this type of situation? What type of success have you had in these types of negotiations?
- Request a copy of their grievance procedures.

## ATTACHMENT 7. SAMPLE CANDIDATE EVALUATION FORM

After the interview, review your notes from the Sample Interview Form and complete this evaluation.

**Support Coordinator's Name:**

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**Firm Name:**

**Phone Number:**

**Date of Interview:**

**Notes: (Continue on Back)**

- 
- 
- 
- 
- 

**Evaluation: How does this candidate rate on a scale of 1 – 5, (5 being the best)?**

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How did the person match up to the personal qualities you are seeking (e.g. personality, special skills, demographics)?

1 2 3  
4 5

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Does the individual feel comfortable with the person? Is the candidate likeable, sincere, accessible?

1 2 3  
4 5

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Is the person a good listener?

1 2 3  
4 5

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Is the person enthusiastic about the job?

1 2 3  
4 5

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Is the person qualified? In addition to training and education, does the candidate sound competent, knowledgeable?

1 2 3  
4 5

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Are the candidate's ideas about service – philosophy – consistent with the individual's?

1 2 3  
4 5

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Does the individual receiving services agree with the candidate's approach to services?

1 2 3  
4 5

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Does the person offer any unique or creative approaches?

1 2 3  
4 5

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Can this person represent the individual's best interests?

1 2 3  
4 5

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Are their grievance procedures clear and fair?	1	2	3
	4	5	
TOTAL			

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## **ATTACHMENT 8. SAMPLE WARNING LETTER**

Dear (Name):

Recently we met to discuss concerns we have regarding the support coordination services you are providing.

As we explained, our concerns are related to **[state the reason here, e.g. - the way you are performing your job OR our inability to effectively work together OR our differences in service delivery philosophy or approaches]**.

As we discussed, these are specific examples of the problem:

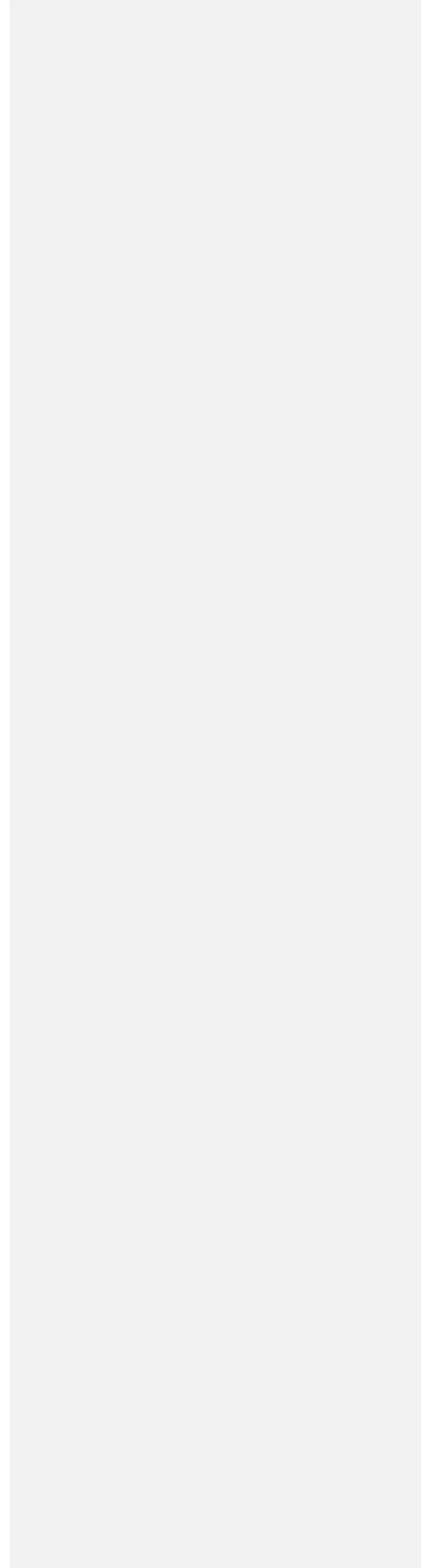
**[Describe at least two specific situations that illustrate the problem. Be brief and non-inflammatory, e.g. - Last month we asked that you solve this problem. It has still not been resolved; OR, When we met last month to discuss our concerns, the meeting was argumentative; OR, We have different opinions about who should make what decisions, for example ...]**.

As we agreed, we will take the next 30 days to see if this situation gets better. If it is not resolved to our satisfaction, please be advised we will **[waiver]** terminate your services OR **[non-waiver]** request a new support coordinator. We will meet again on **[mutually agreed upon date approximately 30 days in the future]** to review these

concerns.

We look forward to resolving these problems.

Sincerely,



## **ATTACHMENT 9. SAMPLE TERMINATION LETTER**

Dear (Name):

On *[date of first meeting]* and *[date of follow-up meeting]* we met to discuss concerns we have regarding the support coordination services you have been providing.

As you are aware, we have been dissatisfied with *[state the reason here]*.

The time period we set for evaluation has ended and we are still not satisfied with your performance.

This is to notify you that we are *[waiver]* terminating your services OR *[non-waiver]* requesting the District assign a new support coordinator. You are to continue providing support coordination services, as required by Developmental Services, until a new support coordinator is on the job.

Thank you for your cooperation during the transition period.

Sincerely,

## **ATTACHMENT 10. WAIVER PROVIDERS**

### **Selecting Waiver Providers**

The support coordinator is responsible for arranging for service from providers who have been chosen by the individual. He or she is also responsible for making sure services are bought at the most cost-effective rates available. The individual receiving services needs to be involved in this process as much as possible:

- A list of current providers and district approved rates for payment is available from the District Developmental Services Office.
- The individual and, as appropriate, the family or guardian can choose any qualified provider that most meets their needs.
- While support coordinators cannot overly influence your choice of providers, they are a good resource for learning about a provider's services and record of performance.
- If you are unfamiliar with a provider and want more information before committing, meet with the provider and take a look at their program or services. Invite your support coordinator to come along. Ask the provider some of the same questions you asked when hiring your support coordinator. Also ask the provider if he or she has any satisfied customers you can talk to. They will need to have permission given to release their names.
- If no provider is available in your area to provide an authorized support or service, it's the responsibility of the support coordinator to try his or her best to develop the resource or an alternative.
- Support coordinators are expected to process invoices for service providers within five working days, and to assist providers with denied or incorrectly-paid invoices or claims.
- To receive payment, providers must provide documentation to the support coordinator that assures that supports were provided consistent with the Support Plan. The

documentation may include: progress notes, reports, data from programs, activity logs, attendance logs, transportation logs or other district requirements.

- If you get a call from a provider about payment errors, refer the person to your support coordinator.

## **ATTACHMENT 11. PROVIDER PROBLEMS**

### **Handling Provider Problems with Your Support Coordinator**

Clearly, one of the key responsibilities of the support coordinator's job is serving as a go-between for the individual receiving services and the provider. Provider problems can be an exasperating and stressful experience for the individual, as well as for families and guardians. If the individual or family is dissatisfied with a support or service, the support coordinator is responsible for *helping* resolve the problem. You and the support coordinator need to work together to find a solution.

The support coordinator will assist the individual and family by interpreting, negotiating and advocating for the needed services.

- When a problem surfaces, contact your support coordinator. Decide together who will address the matter with the provider. The individual, parents or guardians might easily and effectively handle a small concern. Or the support coordinator might best handle an administrative issue.
- For a more serious problem, ask your support coordinator to set up a meeting with you, the individual receiving services, the provider and the support coordinator. Hopefully, this will solve the problem.
- If the problem continues, change providers.

If the issue is not resolved, and the individual is enrolled in the waiver, he or she has the right to change providers. If the individual is not enrolled in the waiver, District Developmental Services Program Office staff should agree to find a new provider for a valid complaint. Remember, there has to be another provider available. In some Districts, there are a limited number of certain types of providers.

## **ATTACHMENT 12. APPEAL INFORMATION**

**Excerpted from the Support Coordinator Guidebook  
(emphasis added)**

### **DUE PROCESS AND APPEAL RIGHTS**

Individuals and families must be informed about their due process rights during every facet of the application and eligibility process **as well as during ongoing service provision**. The district developmental services program office must notify each person who applies for or receives developmental services, in writing, that they have the right to disagree with eligibility decisions, **evaluation results, the support plan or any other service that developmental services may be providing**. Individuals are also to be informed of their right to discuss the issues of disagreement with district staff.

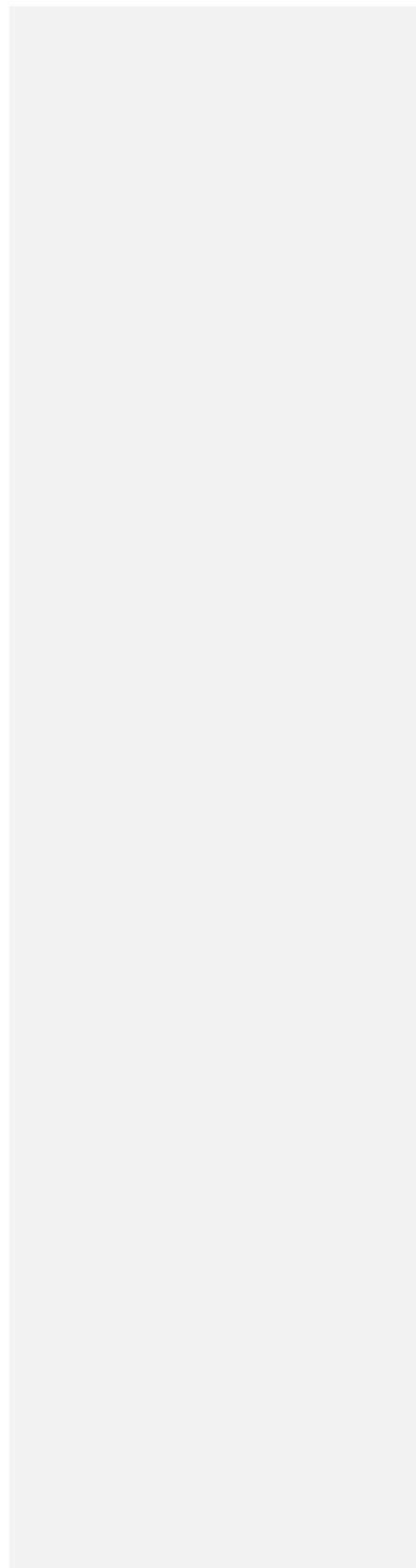
If an agreement is not reached with district staff, the applicant or other individuals are to be notified, in writing, of the right to file an administrative appeal according to Chapter *\*120.569 and 120.57*, F.S., within 20 calendar days after receipt of the eligibility decision or other information resulting from the discussion of the disagreement. The applicant or other individuals are to be given the name of the contact person and the address where the written request for appeal is to be sent.

If an individual is unable to write a formal request for an appeal, developmental services staff then refer the person to the district client relations coordinator, an advocate or an advocacy system who/which will assist in filing a formal appeal.

Upon receiving a request for an administrative hearing, the district administrator or designee determines if the factual issues are in dispute. If factual issues are in dispute, the district administrator or designee then files a formal hearing request with the division of Administrative Hearings (DOAH) within 15 days of receiving the appeal.

If the district administrator or designee determines that factual issues are not in dispute, an informal proceeding is scheduled by the district administrator or designee. The department does not take any further action with respect to the proceeding on a matter that has been referred to the DOAH for a formal review, except as a party litigant, until the department receives the recommended order from the Division

of Administrative Hearings. Until a final order is entered, previously authorized supports and services continue to be provided without interruption.



## **ATTACHMENT 13. CONTACTS**

### **STATEWIDE RESOURCES and CONTACTS**

#### ***Developmental Services Program, Department of Children and Families***

The state's Developmental Services contact for issues or concerns about Support Coordination is Denise Arnold, Support Coordination Program Administrator, Developmental Services Office, Florida Department of Children and Families, 1317 Winewood Blvd. Bldg B. Room 315, Tallahassee, FL 32399-0700. 850-488-4877, ext 165. FAX 850-922-6456. TDD 850-921-1304.

***Advocacy Center for Persons with Disabilities*** – This program provides information, referrals, legal services and advocacy for the rights of people with physical, developmental or mental disabilities. 1-800-342-0823, 1-800-346-4127 (TDD), 800-350-4566 (Spanish and Creole)

***ARC/Florida*** – Statewide association of advocates and service providers for people with disabilities. 1-800-226-1155

***Florida Association of Support Coordinators (FASC)*** – Statewide association of support coordinators. 1998 President, Janice Phillips, (850) 877-4393

### **DISTRICT DEVELOPMENTAL SERVICES SUPERVISORS**

Listed by district on the following page

**LOCAL ARC CHAPTERS – EXECUTIVE DIRECTORS**

Alachua

Dick Bradley  
3303 NW 83rd Street  
Gainesville, Fl  
32606  
(O) 352/376-4899

Baker

Richard Mitchell  
P.O. Drawer L  
Live Oak, Fl 32060  
(O) 904/362-7143

Bay

Sharon Lipford  
4440 Putnam Street  
Marianna, Fl 32446  
(O) 850/482-5391

Bradford

John Conneely  
P.O. Box 1026  
Starke, Fl 32091-  
1026  
(O) 904/964-7699

Brevard

John Schweinsberg  
1694 Cedar Street  
Rockledge, Fl 32955  
(O) 407/690-3464

Broward

Michael Messer  
5555 Biscayne Blvd.  
Miami, Fl 33137-2656  
(O) 305/759-8500

Calhoun

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Marianna, Fl 32446  
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Dade

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Nocatee, FL 34268  
(O) 941/494-2328

Dixie

Richard Mitchell  
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Live Oak, Fl 32060  
(O) 904/362-7143

Duval

Acting Director  
1050 N. Davis Street  
Jacksonville, Fl  
32209  
(O) 904/355-0155

Escambia

Donna Fassett  
3913 N. 10th Avenue  
Pensacola, Fl 32503  
(O) 904/434-2638

Flagler

Kathryn Lopez  
P.O. Box 354412  
Palm Coast, FL 32135  
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Franklin

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