



# Procedures Manual

## Coordinated Future Planning

**Scope:** Case Management

**Definitions:**

**Caregiver Succession Plan (CSP)** – Caregiver succession planning is intended for clients residing not *under vendored care*, but rather, with a caregiver (family or non-family) that is their primary support. A CSP is *person-centered* plan developed by the planning team that incorporates client *choice* in identifying supports for an individual if they were to lose their primary caregiver.

**Choice** - All public and private agencies receiving state funds for the purpose of serving persons with developmental disabilities provide consumers with opportunities to exercise decision-making skills in any aspect of day-to-day living and provide consumers with relevant information in an understandable form to aid the consumer in making his or her choice. WIC 4502.1

**Living Options** – The client’s preferred type of living arrangement. *See Living Options Information Guide* regarding specific information about the following options:

- Family Home/ Home of Another,
- Own Home,
- Own Home with Independent Living Services
- Own Home with Supported Living Services
- Residential Care Facilities
- Foster Homes
- Group Homes
- Small Family Homes
- Family Home Agency
- ICF/DD-H
- ICF/DD-N

**Person-Centered Planning** - “Person-centered planning is a process, directed by an individual who utilizes support, intended to identify the strengths, capacities, preferences, needs and desired outcomes of the individual. The individual directs the person-centered planning process. The process includes participants freely chosen by the individual who are able to serve as important contributors. The participants in the person-centered planning process enable and assist the individual to identify and access a personalized mix of paid and non-paid services and supports that will assist them to achieve personally-defined outcomes in the most inclusive community setting. The individual identifies planning goals to achieve these personal outcomes in collaboration with those that the individual has identified.” (Adapted from CMS Definition of PCP 2014)

**Under Vendored Care** – In the context of residential *living options*, living under vendored care means receiving residential support from a licensed care home, intermediate care facility, family home agency, or a supported living agency.

### **Key Components of Coordinated Future Planning:**

1. CFP has two phases, with different responsibilities for SCs at each stage
  - a. **Preparation Stage** – Beginning October 1, 2021
    - i. In the annual IPP Meeting for clients residing with aged caregivers, the SC shall ask the following two questions:
      1. Is the primary caregiver age 70 or older? Y/N
      2. Is there a caregiver succession plan? Y/N
    - ii. In all cases, the SC will document the caregiver succession discussion in the IPP. If the primary caregiver is age 70 or older, the SC will also email their CSM the client’s UCI number and answers to the two questions and if the client is interested in pursuing a different living arrangement.
      1. CSMs will update their CFP Tracking Workbook located at <Q:\All Staff Access\Coordinated Future Planning\CSM Folders>
  - b. **Implementation Stage** – Beginning October 1, 2022 and ongoing
    - i. In the annual IPP meeting for clients residing with aged caregivers, the SC shall:
      1. If no caregiver succession plan exists
        - a. Facilitate a discussion about caregiver succession planning
        - b. Document the discussion in the IPP as well as emailing their CSM the client’s UCI and the answers to the two questions.
          - i. CSM’s will update their CFP Tracking Workbook located at Q:\All Staff Access\Coordinated Future Planning\CSM Folders

2. If a caregiver succession plan exists
  - a. Hold a discussion to determine if the caregiver succession plan needs to be updated.
  - b. Document the discussion in the IPP as well as emailing their CSM the client's UCI, and the answers to the two questions.
    - i. CSM's will update their CFP Tracking Workbook located at Q:\All Staff Access\Coordinated Future Planning\CSM Folders
  
3. Provide information about various types of living options.
  - a. Independent Living, Supported Living, Residential Care, Family Home Agencies.
  - b. if client requests a living option that is not currently available in the desired location, SC will document Needs Assessment information
  - c. Document the discussion in the IPP as well as email their CSM whether the client is interested in exploring other living arrangements.

**Example of CSM CFP Tracking Workbook**

							Year One FY 21/22				
CSM	Service Coord.	UCI	Consumer Last Name	Consumer First Name	Age	Date Of Birth	Date of IPP	70 + Caregiver?	Caregiver Succession Plan?	Client interested in exploring other living options?	Notes
						00/00/00					

**Note:** CSM workbooks will already be populated with those clients age 52 or older that reside with family. Service Coordinators are encouraged to conduct this assessment with every client with primary caregiver age 70 and older. CSMs can add those clients younger than 52 to their CSM Tracking Workbook. The workbooks will have additional space for Year Two and Year Three activities.

**Additional Resources:**

ACRC Website: <https://www.altaregional.org/coordinated-future-planning>

Message to clients/families – ACRC is starting a new initiative, Coordinated Future Planning, to focus on the housing needs of clients residing with aged caregivers.

The initiative calls on a group of stakeholders: *clients, family members, advocates, and service providers* to join with regional center staff in both developing and delivering training to service coordinators. This training will focus on the need for caregiver succession plans for each regional center client, as well as seeking to increase the competencies of service coordinators in discussing a range of living options at individual program plan (IPP) meetings.

The first step of the initiative is for service coordinators in IPP meetings to collect data on *whether regional center clients are living with a primary caregiver aged 70 or older*. Concurrently, service coordinators will ask *if there is a plan to provide support when the primary caregiver is no longer able (a caregiver succession plan)*. This data will be used to quantify how many clients need written caregiver succession plans, and to assess the effectiveness of this new initiative.

It is the regional center's desire that future IPP documents for clients living with aged caregivers will include:

- a caregiver succession plan
- documentation of a discussion of a range of living options to include residing with family members, legal guardian, foster home, group home, independent living, supported living, residential care, and/or family home agencies as appropriate based on client age and needs.