

Windsor Essex Brokerage

for Personal Supports

*Whatever life we have experienced,
if we can tell our story to someone
who listens, we find it easier to deal
with our circumstances.*

Margaret J. Wheatley

August 2014

Foundation and Roots of Brokerage:

Our Story

In the mid 1980's, people living in Windsor and Essex County started talking. Families, people with disabilities, and others who cared about the way supports were designed for people with disabilities were asking for changes.

By 1989, a Strategic Plan was written with goals and a vision for Windsor-Essex about how things could be done differently so that children and adults could experience full inclusion in their schools and communities. One of the ideas was individualized funding. People would have control over their supports and who helped them. A second idea was independent planning. People could dream big about their future with someone who worked just for them. Other ideas that developed were about circles and networks of support. These ideas were not understood or supported by all, but to be fair, a decision was made to explore the new ideas and see if they would work. Thus, projects were tried, tested and evaluated into the mid 90's. The result was that people coming home to Windsor-Essex from institutions had an independent facilitator doing the planning with them in the early 90's. They also received funding that was individualized and designated for their use. This planning concept was unique and revolutionary.

Once people began hearing about this new concept, there was great excitement and people began requesting this model. They wanted the new options of independent facilitation and individualized funding. They wanted help with their support networks. They wanted to be able to control their own destiny. By October of 1997, people with developmental disabilities and families became part of a Steering Committee along with partnering agencies. They would oversee a new project with new ideas – **one that would be for anyone who wanted it**. The Steering Committee decided to call this the Brokerage Project.

The committee established their core values which emphasized freedom to make choices and having control over one's life. They set out to find people who wanted to be part of this project. Ultimately, 17 people with disabilities and their families joined in on the Brokerage Project. A broker-facilitator worked with these 17 people giving them information, planning with them, and facilitating whatever they needed. By the end of the first year, the Steering Committee had contracted an evaluator to learn if these new ideas made a difference.



An evaluator with experience in community inclusion and self-determination was hired. He spoke with families and partners involved in the Brokerage Project. He composed an evaluation with recommendations, many that were implemented, that still hold validity today.

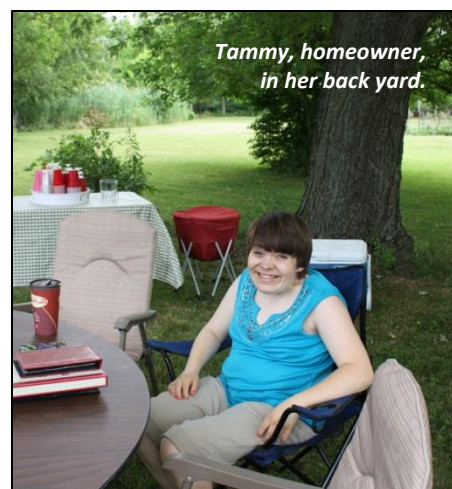
"Listening deeply to that often 'silenced-voice' has been difficult as people with disabilities have not traditionally had a say in directing their lives. Listening does not come naturally to the rest of us."

*Best Practices: Windsor- Essex
Model for Adult Developmental
Services, Windsor-Essex
Family Network, 2004*

Windsor Essex Brokerage for Personal Supports (Brokerage) was established as a transfer payment agency in 1999. It became a permanent place in Windsor-Essex for **those who would choose it**. It would become the place for information about possibilities. It would be a place to go for assistance with options and ways to live life in the community. It would be new and different. Windsor Essex Brokerage for Personal Supports began to expand the work. It didn't take long for people outside of the Windsor/Essex area to say, "We want to try these new ideas."

It has been the hallmark of Brokerage over the past 16 years to encourage people and families to share their stories. Others have published information about Windsor Essex Brokerage for Personal Supports in books and newsletters. Partners have made a video. Family members and facilitator-brokers have participated in speaking engagements held in other parts of Ontario. Brokerage has been very forthcoming in sharing their ideas at local, regional, provincial, national and international levels. Windsor Essex Brokerage continues to participate in projects and their evaluations. Evaluators would write their stories, reports would go into the government, and personal testimonials and quotes were collected.

As a result, in Essex County by the year 2013 Windsor Essex Brokerage for Personal Supports has become a respected part of our rich history and heritage with the same core values established in the year 1997.



So what it is it that makes Brokerage different?

It is the core values. In many ways the question of what differentiates Brokerage while supporting people along their journey toward an ordinary life has turned us to our roots. The work of Brokerage has been extensive and deep. It has been evolving over 16 years. There is a sense though that the work has continued to emanate from deep principles that were there at the beginning and have become richer over the years. It is like watching a tree that is deeply rooted in the ground, grow steadily over the years.

The factors differentiating the independent facilitation offered by Brokerage are the application of their core values which are known as the universal five principles of self-determination (Nerney):

- **Freedom:** To live a meaningful life in the community
- **Authority:** Over dollars needed for support
- **Support:** To organize resources in ways that are life enhancing and meaningful
- **Responsibility:**
 - To use public dollars wisely
 - To other people and families that need dollars
 - To contribute to the greater good
- **Confirmation:** Of the important leadership that people with different abilities must hold in any system

About Windsor Essex Brokerage

People with disabilities and their families offer hope and inspiration to those of us at Windsor Essex Brokerage for Personal Supports. It is the people, their families and support networks we partner with who direct the planning process and who we count on to keep things real.

We facilitate meetings based on the direction provided. We negotiate supports, and connect with businesses, recreational settings, and other community places to talk about what a person may need to be included. We also encourage support network members to do the same. We provide ideas around roles for support workers and what one might expect or ask of a worker. We assist parents who are tired and need the encouragement to take that next step with their family member who may be expressing the need for a change in their life. **We only do these things when directed** by the person and their support network and **only when they are ready**. It is so important to be in a trusted relationship. We wouldn't have it any other way.

The first thing we do is get to know people and have them get to know us. We can't proceed with anything until we reach that point of trust. We ask who is in their lives and meet their trusted family and friends - their network of support or circle. If there is no one in their lives we talk about how to change that. **We are honoured to assist people** to have their voice heard within their network and among their family.

We research information for people at their request. We work from the premise that communities are ready to invite, accept and be part of people's lives. We go forward, believing that freedom and inclusion are possible. Our roles are varied – but clearly all important. In the Windsor Essex Brokerage Pilot Project Evaluation Report, May 1998, it was noted that *"It was in playing a range of roles, given the limited resources and*

opportunities that many individuals and families now face, that the effectiveness of the brokerage was realized". We find this to be especially true today.

We have collected stories and testimonials; we have written and re-written plans and action steps as things changed and evolved. We are always amazed at how hard people with disabilities and their families work to have an ordinary life – **just like the rest of us.**

"... my son seemed unhappy. We thought he was telling us through his actions that he wanted to move out. Through Brokerage's skilled facilitation, my son, who is not verbal, was able to express his desires in his own way. All he wanted was his own space in our home. They (broker-facilitators) are skilled at putting the tough stuff on the table, helping work it through and then really listening deeply. When Sean ran up and hugged Marlyn we knew she had helped us all get to the truth."

*Lise, Sean's mom, Tecumseh, Ontario
The Compass, Family Alliance Ontario,
Spring 2005*



Sean, front left, with his extended family

Meet some of the people working with Brokerage

It's one thing to have numerous evaluations and projects that over and over again demonstrate the impact of the work of Brokerage. However, we believe that the most powerful examples are first hand testimonials and stories from people and families who have partnered with Brokerage over 16 years.

Sandra

Before Sandra's mom, Jan, passed away, she had shared her hopes and plans with the people she trusted. Jan was confident that her daughter would be listened to and would have the life she desired knowing that Agnes, Jan's other daughter who lives in Waterloo, would work closely with Sandra's support network and Brokerage. Jan was clear that Sandra's life was here in Windsor and Essex County, the place she had lived her entire life.



Today, Sandra's independent facilitator helps her with her support network meetings. Her sister, her fiancé, her aunt, and friends come together and talk with Sandra about what's working and any new next steps. One friend hangs out with Sandra when she gets her hair cut at the salon she has always used. She bowls regularly with other members of the support network; her aunt assists her with personal finances; she and her fiancé go out together on Friday and Saturday nights, etc. Sandra is able to make her own choices so her life can continue in much the same way. That is because of the relationships in her life, some funding that is individualized to pay support workers for those times she needs them; an independent facilitator, activities that were always a part of her life and the values within Brokerage.

Sean

When Sean wanted his own space within his parent's home he demonstrated this with his actions and frustration. With no words it took a long time for his family to figure out what Sean wanted. Without the relationship Brokerage had with Sean, his facilitator could not have helped his family figure out what he was 'saying'. Today Sean has a self-contained apartment within his family's home with his own entrance. He likes his space and when he has had enough he has been known to escort his support workers to the door. His apartment is safe and gives him the space and privacy he needs. Although most would claim he needs 24/7 support, as long as someone is in the house upstairs, staff is not needed overnight and for other times during the day. All of this was designed and tailor made.

Sean is actively involved in his community: shopping for groceries, going for a run, helping in the kitchen, hanging out with friends, listening to music in the evenings, shredding paper once a week, and grooming and riding at the horse farm. Life just doesn't get any better than that for Sean.

Jerry

Jerry has been out of school a few years now. He enjoys his volunteer contribution at two schools out in the county. The grade four students in Essex look forward to him coming. Jerry teaches the children about being blind and reading Braille, and the students show Jerry with open arms that he is welcomed, respected and to them a teacher. He also spends time at a high school in Leamington. He enjoys going with his support worker thanks to some individualized funding that pays her to assist him a few hours per week with the following:



getting together with a close high school friend once a week for lunch; grocery shopping for his mom and sister; practicing using his white cane; assisting to write with his braille. In addition, his facilitator from Windsor Essex Brokerage is helping him and his family to think about the future and whether Jerry might like a place of his own.

My Life My Choice

My Life My Choice (Video) showcases the tailored and individualized lives of seven other people living with disability in Windsor-Essex who along with their families share their stories. With the support of independent facilitation and planning, some individualized funding, and a vision for life in community – Isaac, Lisa, Melissa, David, Amanda, Peter, and Neil – offer a glimpse of what their life is like. The passion of music, the spirit of an entrepreneur, shopping experience with all of the tastes and touch of the products, the love of animals, the freedom to choose alternative paths, and having responsibilities are just a few of the things that are shared by these folks.

Many have said that freedom for people and families living with disability does not come easy. At Brokerage we encourage people to ask us for what they need to make freedom of choice and empowerment a reality in their lives. We believe that this is what most of us want. It is part of having an ordinary life contributing and participating as an everyday citizen.

“Hope came in the form of an introduction to the manager of Windsor Essex Brokerage for Personal Supports in 1999. Marlyn was a godsend because through her close working relationship with Lesley and myself we have been able to do some very creative work in getting Lesley out in the community and doing things she enjoys.”

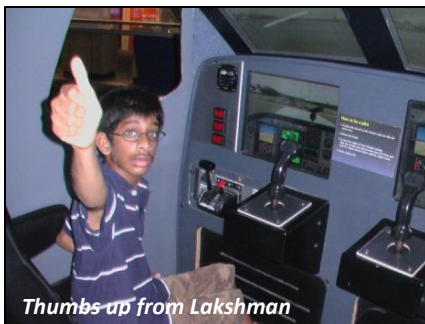
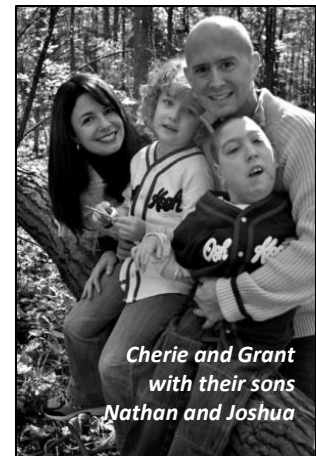
***Bob, Lesley's father, Amherstburg, Ontario
The Compass, Family Alliance Ontario
Spring 2005***



Quotes from parents of young teens who would like independent facilitation

"Developing networks around both our children who live with disabilities would be a dream for our family. Our oldest son is entering his teenage years. His indomitable spirit shines despite his physical challenges. In his own way, he is telling us that he wants independence. He enjoys community: He loves participating. As parents we cannot provide the support he needs to grow the independence he longs for without help of a support network and independent facilitation."

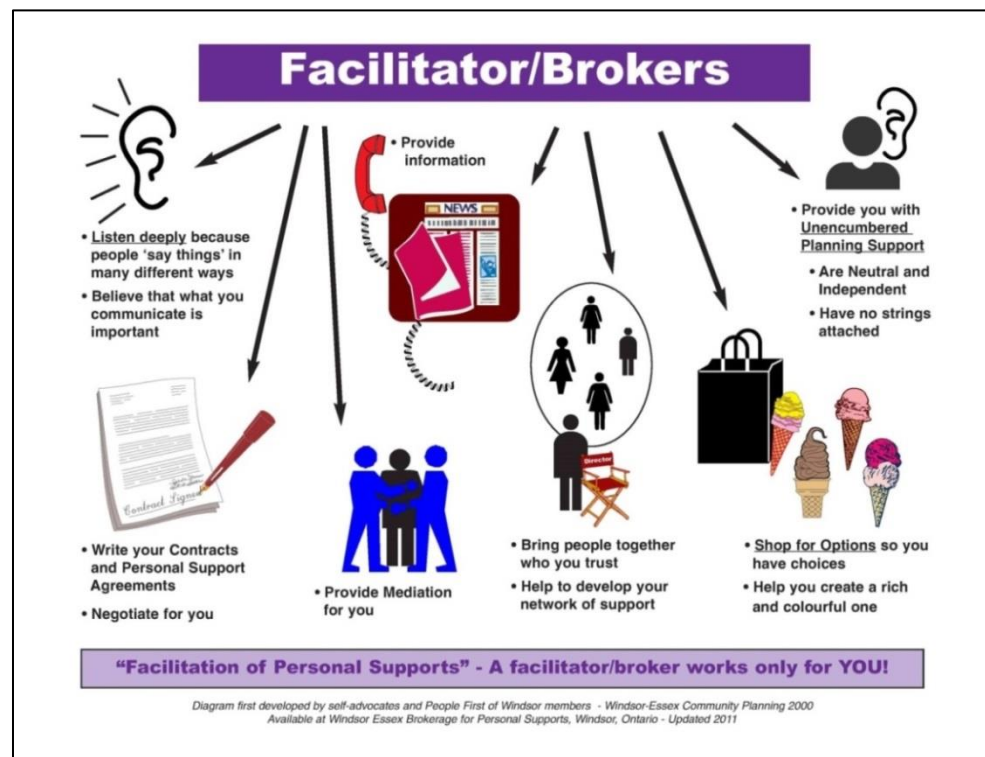
Cherie, Tecumseh, Ontario



"Even though we have been very proactive as a family in supporting my son, we feel ill equipped to handle his teenage years, especially, helping him to be a part of the community around us. As a family who has moved far away from home, we feel like we are not able to give him enough exposure to the outside world as we ourselves are limited in these resources. This is where I think independent facilitation would

be a great asset, as they would help us work as a team in mapping out pathways and identifying possibilities that are tailored to my son's interests. Starting this process in his early and mid-teen years makes more sense as it gets the ball rolling. This is also the time we are looking at him volunteering in the community and thinking of possible careers as he is looking at courses & options in high school. So what better time to have some support for us families to work toward this goal!"

Priya, Lakshman's mother, LaSalle, Ontario



The Best of Brokerage: Positive Reviews are in

Date	Name of Publication	Quotes
1998	Windsor Essex Brokerage Pilot Project: Evaluation Report By Michael Bach, The Roeher Institute	"The pilot project has shown that what brokerage has to offer is a place where individuals and families can go to dream about their future, chart a path in that direction, and obtain assistance in heading down that path." p.21
1999	Systems Review of Adult Developmental Supports and Services: Windsor and Essex County Prepared by Don Gallant	"To best ensure that planning results in outcomes responsive to individuals and families, not service providers, it is imperative that planning be vested with a community agency without linkages to actual service delivery." p.45
2004	Best Practices, Windsor-Essex Model for Adult Developmental Services Prepared by Windsor Essex Family Network	"Families have told us that lives have also improved . . . because they were able to negotiate a different support package with the help of 'brokerage'. Others report creating something completely unique in the community – this as a result of an allocation of support dollars and being able to handpick their team of support workers." p.4
2005	Personal Satisfaction Survey for Windsor Essex Brokerage for Personal Supports Compiled by Steve Monaghan Communications	As a result of the satisfaction survey we learned that: 93% of participants who responded indicated they were comfortable talking to their broker/facilitator; 95% indicated they were satisfied with how their broker/facilitator listened to them; 95% felt that the information provided by their broker/facilitator connected them to the right people and services.
2007	Pathways to Inclusion – Building a New Story with People and Communities , By John Lord and Peggy Hutchison	"Marlyn Shervill, from Windsor-Essex Brokerage for Personal Supports, lives the values . . . she constantly reminds people through her actions that the power of each person matters. She emphasizes that we need to do 'whatever it takes' to assist people in living their dreams." p.111
Sept. 2009	Evaluation of Person-Directed Planning Demonstration Project Report prepared by Carolyn Sherk Consultants	"Brokerage was the most insistent in reinforcing their strongly held values in their day-to-day activities." p.23 "The plans in Windsor Essex were the most extensive, focusing on support networks and life goals. The plans included short and longer term goals and documented the progress that had been achieved in many of the short term goals and a few of the longer term ones." p.34
Sept. 2009	An Evaluation Report – My Voice, My Choice, My Life Design: Planning Demonstration Project : Prepared by Community Consultation Resources	"By far, the greatest change was that the person's voice had increased and they could and were making decision about their life." p.8 "There were two (2) overriding values that were reflected. These values were people and families' belief in citizenship and inclusion and families belief in the worth and gifts of their family member." p.12
Oct. 2009	Person-Directed Planning Demonstration Project Wrap Up Session - Summary Notes - By Rae Roebuck, First Leadership Limited	" . . .person-directed planning process as expressed in Windsor Essex sees individuals and families as partners who are the ones to direct and define the partnership." p.8 "In part, the approach to community capacity building is a function of the state of the community . . . for Windsor Essex where the concepts and relationships in the community are mature, the focus was on individual level of capacity building." p.8
Feb. 2010	A Deeper Look at Windsor-Essex Brokerage for Personal Supports Presentation to Peter Steckenreiter, MCSS Regional Director, by WEBPS	"The three sites received similar funding levels, but it appeared that the free-standing organization, Brokerage, served a more complex population and provided more in-depth planning and evaluation (Sherk)." p.5 "In Windsor-Essex all individuals participated in all discussions. (Sherk)" p.8
Aug. 2011	Individualized Funding: A Framework for Effective Implementation National Individualized Funding Discussion Group	"To be effective, personal planning must: - be directed by the person, - be separate from the eligibility, service delivery and funding functions . . . - be facilitated by an external neutral party who is knowledgeable about the options and supports available to the individual they are supporting, and who is able to guide the process . . . - be available to the individual as needed over time." p.12
April 2012	Shared Leadership: A White Paper on Independent Facilitation and a Regional Network , By Windsor Essex Brokerage for Personal Supports	"People and families that choose independent facilitation are choosing innovation . . . In partnership with their independent facilitator they are inventors. They create a new reality. Inventors do not fear failure; they keep experimenting until they find the solution." p.6