

# **MACROW**

## **SELF-DETERMINATION CHECKLIST**

**VERSION 3.4**  
**(Revised 11.03.01)**

Developed to Assist Self-Advocates, Family Members, Personal Agents, Case  
Managers, Support Coordinators, Service Coordinators,  
Support Brokers, Fiscal Intermediaries and Circle Members in  
Developing Person Centered Plans and Individual Budgets  
Based on the Principles of Self-Determination

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## **Preface**

This checklist is intended to be a barometer to indicate if you are setting a course that will ultimately support individuals with disabilities in "getting a life." Many individuals have, through conversation, presentations, publications or sharing life experiences contributed to this checklist. Periodically it will be revised to incorporate current feelings, needs, dreams and views of individuals with disabilities, their families and friends. The checklist is not intended to replace or be used as a personal "outcomes" evaluation tool.

The reference to the "Personal Life Quality Protocol" (Center for Outcome Analysis) and the "Planning Guide for Paid and Unpaid Companions" (Cummings and Crowley) are suggestions only. Other tools serving the same purpose may be available. The Principles of Self-Determination and Principles for Action are provided as reminders to those completing the checklist.

[NOTE: The following pages are adapted from several publications authored by Ellen Cummings, Thomas Nerney, James W. Conroy and Richard F. Crowley.]

### **DEFINITION OF SELF-DETERMINATION**

**"A national movement to redesign long-term care for individuals with disabilities that eschews the traditional program models and facility placement approaches... Self-determination insists that public dollars be seen as an investment in the lives of people with disabilities. Public dollars need to be used strategically to support existing family and community relationships as well as to help create them where they do not exist."**

**- Tom Nerney, 1998**

## **PRINCIPLES OF SELF-DETERMINATION**

The following principles are meant to provide a philosophical foundation for substantive system and cultural change that incorporates values deeply held by persons with disabilities, families, friends and advocates:

- ☐ **FREEDOM:** to choose a meaningful life in the community
- ☐ **AUTHORITY:** over a targeted amount of dollars
- ☐ **SUPPORT:** to organize resources in ways that are life enhancing and meaningful to the individual with a disability;
- ☐ **RESPONSIBILITY:** for the wise use of public dollars and recognition of the contribution individuals with disabilities can make to their communities
- ☐ **AFFIRMATION:** of the important leadership role that self advocates must play in a redesigned system and support for the self advocacy movement

## PRINCIPLES FOR ACTION

**Self-Determination** is another way of saying *freedom*. It is a fundamental human right that *affirms* the leadership roll self advocates and family members and empowers people to have *authority* over how their lives will be lived, where and with whom. It means that people have control of the resources needed for their *support*, as well as having *responsibility* for their decisions and actions. It *affirms* the emerging leadership role that self-advocates and family members have in guiding systems change.

### ☐ DIGNITY AND RESPECT

All people have an inherent right to be treated with dignity and to be respected as a whole person with regard to mind, body, and spirit. Most of life's greatest lessons are learned when we make choices that we later realize were mistakes. All people have the right to the dignity of risk. The network of support makes risk possible by weaving a net, which provides safety and supports growth.

### ☐ RELATIONSHIPS

Supporting people in developing and maintaining relationships is an on-going process. A relationship must be treasured, nurtured and protected. Those with whom the individual has real relationships provide the strength assistance and security, which ensure each person's well being.

### ☐ CHOICE

People have a right to choose what they do with their lives where and with whom. When people need help, it is friends and family closest to them who can assist in broadening their experiences and exercising their right to choose. A personal network or circle of support chosen by the person ensures *freedom of choice*.

### ☐ CONTROL

People have the power to make decisions and truly control their lives, including their resources and finances. If support must be purchased, the people buying it, with assistance from family and friends when necessary will determine which supports will be purchased and when. People must have control of hiring those who will provide support.

### ☐ DREAMING

All people have dreams and aspirations that guide the actions that are most meaningful to them including commitment to helping people create their dreams, respecting those dreams and helping make them come true is crucial.

### ☐ CONTRIBUTION AND COMMUNITY

Everyone has the ability to contribute to his or her community in a meaningful way. Giving of ourselves helps us establish a sense of belonging and identity. Community membership includes having the opportunity to be truly involved in the routines of the community and to make a difference in the lives of others

### ☐ FISCAL CONSERVATISM

The services the present systems provide are often expensive and often do not meet the needs of those they are intended to support. Making things happen does not always require money. If people have opportunities to make real choices, and control over those choices, they will purchase support in a way that will allow them to get what they need, and pay only for what they receive. Make real investments, spend money more efficiently and make adjustments when needed. They are also responsible to contribute to their support from all financial resources at their disposal. To find the best quality for the most reasonable price, people must be free to purchase in and out of the system.

### ☐ CHANGING ROLES OF PROFESSIONALS

Individuals, as they take control authority over their lives and resources, will assume responsibility for their decisions and actions. Professional and staff work for the individual rather than for the system. Families, friends and staff assist people to create more meaningful relationships, link them with needed supports, remove barriers, develop safety networks, and help dreams come true - ... never forgetting who is charge

### ☐ WHATEVER IT TAKES

Having an attitude that nothing is impossible. As long as it is legal and causes no harm is required. "No we can't" as an answer is replaced with "How can we make this happen?" Those who work in the system become barrier removers.

# MACROW SELF-DETERMINATION CHECKLIST

Individual: \_\_\_\_\_ Date: \_\_\_\_\_

Name of person completing the checklist: \_\_\_\_\_

Relationship to Individual: \_\_\_\_\_

**Please answer each question to the best of your knowledge**

0 = No

1 = Rarely

2 = Sometimes

3 = Frequently

4 = Most of the time

5 = Yes

Score 0 - 5

1. Did the individual choose their personal agent? \_\_\_\_\_
2. Was the Personal Agent (Case Manager, Support Coordinator etc.)  
trained to facilitate the PCP and individual budgeting process? \_\_\_\_\_
3. Did the Individual with disability agree to participate? \_\_\_\_\_
4. Did the Personal Agent & individual hold a pre-planning meeting? \_\_\_\_\_
5. Was a "targeted" individual budget amount available and used? \_\_\_\_\_
6. Were members of the circle solely invited by the individual? \_\_\_\_\_
7. Did individual choose the time, place and date of PCP meeting? \_\_\_\_\_
8. Did the process of dreaming, identifying needs/wants occur? \_\_\_\_\_
9. Were current and future supports determined using the Planning  
Guide For Paid and Unpaid Companions (or similar guide)? \_\_\_\_\_
10. Were all housing options and needs/desires addressed? \_\_\_\_\_
11. Were professional and clinical needs addressed? \_\_\_\_\_

12. Were employment/day needs & desires addressed? \_\_\_\_\_
13. Were all transportation options and needs addressed? \_\_\_\_\_
14. Was a Personal Quality of Life Protocol completed prior to the PCP? \_\_\_\_\_
15. Did the Personal Agent participate in helping recruit circle members? \_\_\_\_\_
16. Do circle members understand their roles and responsibilities? \_\_\_\_\_
17. Do circle members follow through on their commitments? \_\_\_\_\_
18. Does the circle understand that the PCP is dynamic and the individual may request meetings, changes in the plan, circle composition or budget at any time? \_\_\_\_\_
19. Did the individual (or designee) approve and sign the final budget in the presence of the Personal Agent? \_\_\_\_\_
20. Were current (actual) revenue and expenses determined before a "target" figure was established? \_\_\_\_\_
20. Did the individual receive a copy of the final budget? \_\_\_\_\_
21. Was a Fiscal Intermediary used? \_\_\_\_\_
22. Was the Fiscal Intermediary selected by the individual? \_\_\_\_\_
23. Does the individual receive a monthly financial statement? \_\_\_\_\_
24. If the individual moves does the funding follow? \_\_\_\_\_
25. Does the individual have access to cash or use an ATM card, credit card or personal checking/savings account? \_\_\_\_\_

**TOTAL SCORE**