Microboards 101:

An Introduction to a Person-Centered Solution Offering Full Accountability, Active Community Support, and Lifelong Continuity of Care

Webinar Presentation | September 16, 2019

NCAPPS

Welcome to Today's Webinar

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Thank you for joining today's webinar, on Microboards 101: An Introduction to a Person-Centered Solution Offering Full Accountability, Active Community Support, and Lifelong Continuity of Care.

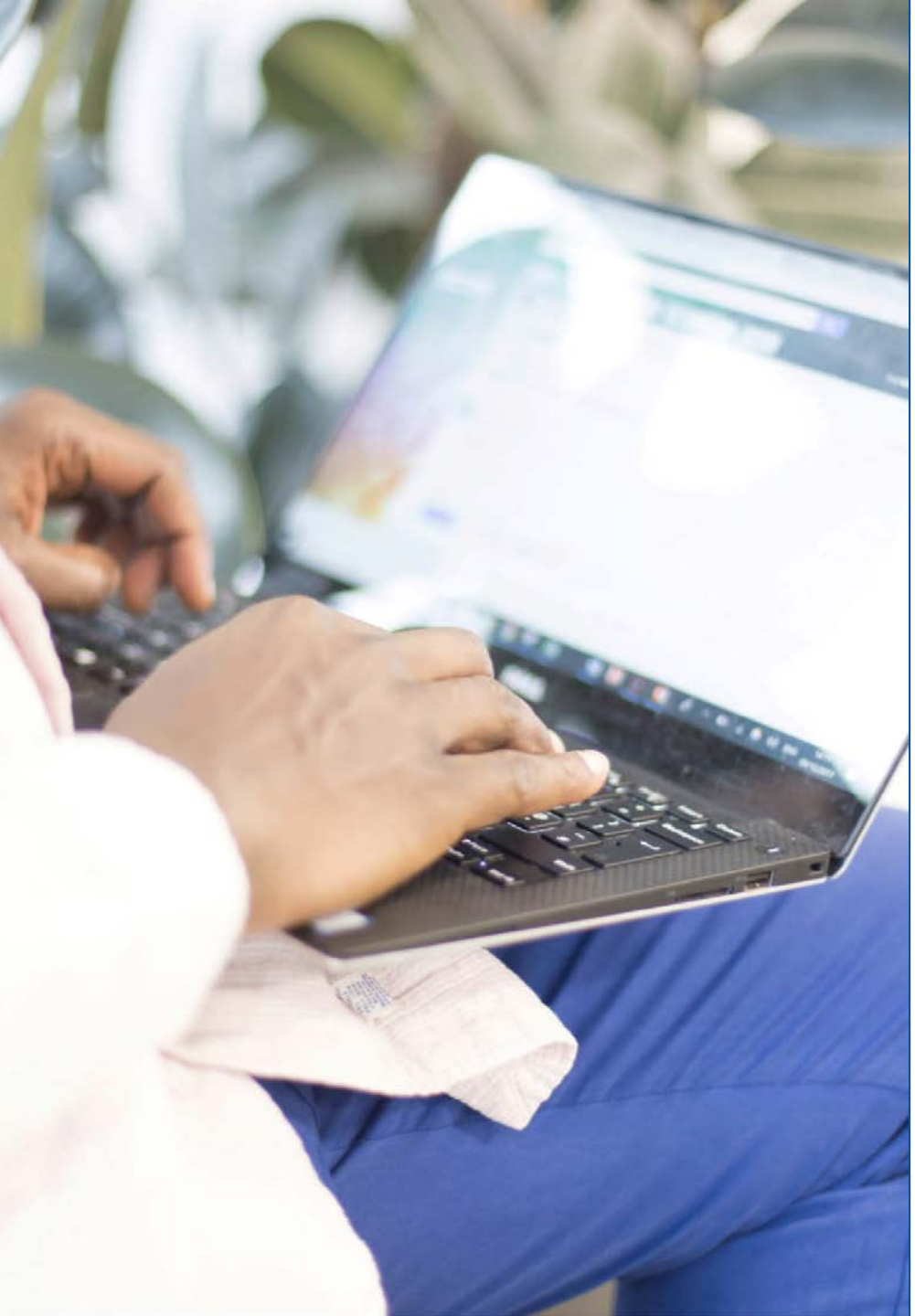
This webinar series is sponsored by the National Center on Advancing Person-Centered Practices and Systems. NCAPPS is funded by the Administration for Community Living and Centers for Medicare & Medicaid Services.

NCAPPS webinars are free and open to the public.

The goal of NCAPPS is to promote systems change that makes person-centered principles not just an aspiration but a reality in the lives of people across the lifespan.

Webinar Logistics

- This webinar is being recorded.
- Participants will be muted during this webinar. You can use the **chat** feature in Zoom to post questions and communicate with the hosts.
- Toward the end of the webinar, our speakers will have an opportunity to **respond to questions** that have been entered into **chat**.
- The webinar will be live captioned in English and Spanish. To access the Spanish captions, please use this link: https://www.streamtext.net/player?event=HSRI-SPANISH
- This live webinar includes polls and evaluation questions. Please be prepared to interact during polling times.



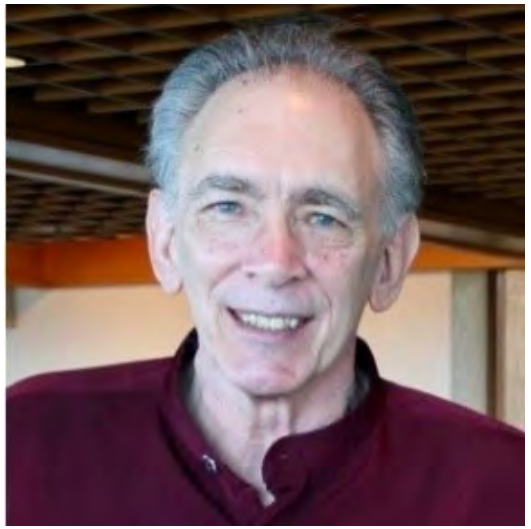
Feedback and Follow-Up

- After the webinar, you can send follow-up questions and feedback about the webinar to NCAPPS@acl.hhs.gov (Please note that this email address is not monitored during the webinar.)
- The recorded webinar, along with a pdf version of the slides and a Plain Language summary, will be available within two weeks at NCAPPS.acl.gov. We will also include questions and responses in the materials that are posted following the webinar.

Meet Our Speakers

Christopher Hunnicutt

Stuart & Anne Rabin



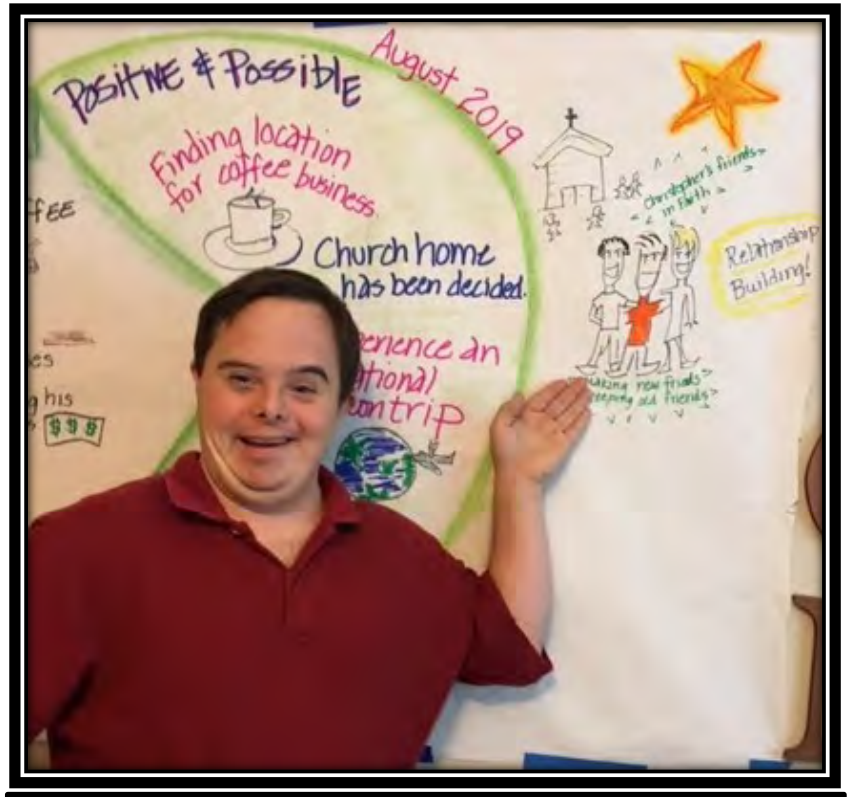
David Wetherow

GEORGIA MICROBOARDS ASSOCIATION

Hello!

Thank you for inviting me to be with you today!

I'm excited to share where I am today thanks to the support of my loving family, friends and members of my Microboard.



Christopher Hunnicutt

The Journey Begins

Though my parents didn't know much about Down syndrome…

They believed God had a **VISION** for our lives… That **VISION** included me living together with them and my sister.

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"Vision"
Small Word. BIG Impact

A clear vision provides a sense of direction; a "north star" that changes as we change over time.

It influences all areas of life… including family, spirituality, physical well-being, leisure, and work.

Their Vision Shaped My Future

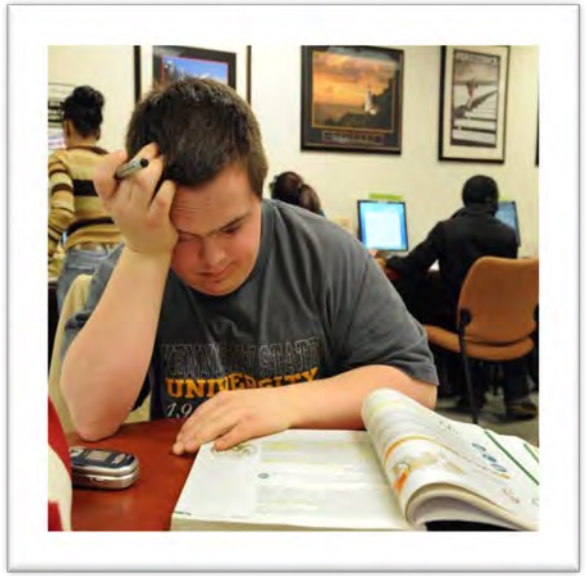
For me, the vision was to be myself at school and in the community with every body else.

It is important to say…
Our family does believe there is a place where separate and special is valuable, ***AND yet*** *our fundamental belief is that people with challenges should be learning, working, worshiping, and having fun…* ***LIVING right in the Community*** *with others* ***from*** *the community.*

Life Lessons I Learned from Childhood

- ✓ Fair play and sharing or sometimes not sharing
- ✓ Competition
- ✓ Skills
- ✓ Teamwork
- ✓ Making and being a friend
- ✓ Power of humor

…as a Student



I went to class and learned alongside my classmates…

Volunteered in my community

Went on Mission trips…

Life Lessons as a Student

Like my typical classmates, I learned:

- Reading, writing and math
- Helping others and working in a team
- Giving back
- Striving and handling hard stuff

Through my experiences as a student, I began to realize:

- **MY** gifts, talents, interests and skills
- **MY** input is important
- **My** goals and roles
- **My** involvement makes a difference

I came to understand:

- I **can** learn
- I **can** grow
- I **can** influence a larger cause

GEORGIA MICROBOARDS ASSOCIATION

Visions… Change

You know what the Rolling Stones sang…

“You Can’t Always get What you Want.”

Visions that “Morphed”

My VISION of becoming a Power Ranger…

…Didn’t happen

Instead, I earned a Black Belt in martial arts.

Visions that "Morphed"

My VISION of going to Berry College...

Not …

I went to Kennesaw State University …

In May 2011, **I graduated** the Inclusive Post-Secondary Education program there.

Now you see how **VISION** guided our Direction to this point….

Let's learn more about the power of Microboards …

Application to Microboards some imperatives…

- Know the interests, gifts, strengths & dreams of the focus person (in GA we use a tool known as a PATH, picture follows)
- Determine who knows the focus person well and cares about their future
- Invite them to gather (FOOD helps!) and begin considering what to accomplish, on what time frame, and what priorities
- Regularly gather (quarterly is about right) to discuss and adjust plans
- Utilize team & individual's strengths to influence outcomes of the Microboard
- Rotate members on and off the Board as situations change to keep fresh ideas and energy

GEORGIA MICROBOARDS ASSOCIATION

My Board Members 2014

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My PATH in 2014

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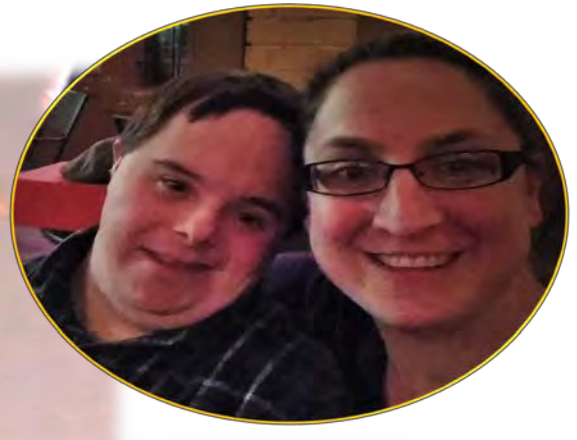
My PATH in 2017

As my PATH shows, faith & friendships are important to me. Here are a few of my “Friends in Faith”.



SOME TYPICAL QUESTIONS REGARDING MICROBOARDS

- Does a Microboard replace the need for paid supports? What is their interface?
- How do you work up the courage to invite people to join the Microboard?
- How long do folks typically stay on the board? What do you think about when inviting new board members?
- What's the range of involvement of the Microboards' members (from most involved to less involved)?

Do You Know How The Rolling Stones Finished The Song?

"If you try sometimes, you just might find you get what you need."

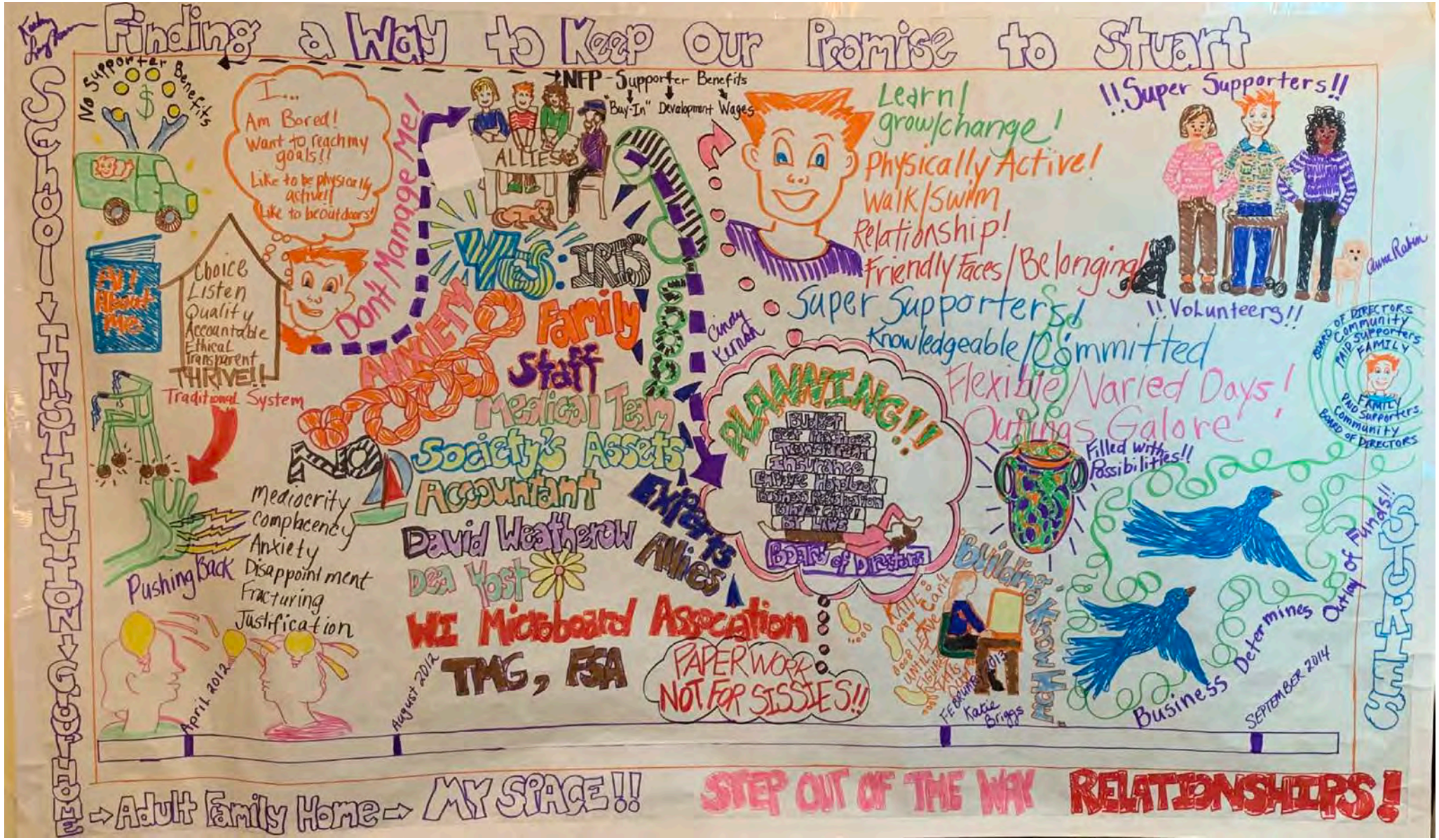
I'd like to thank my parents, friends and Microboard members, the Georgia Microboard Association, and NCAPPS.

“Finding a Way to Keep Our Promise to Stuart”

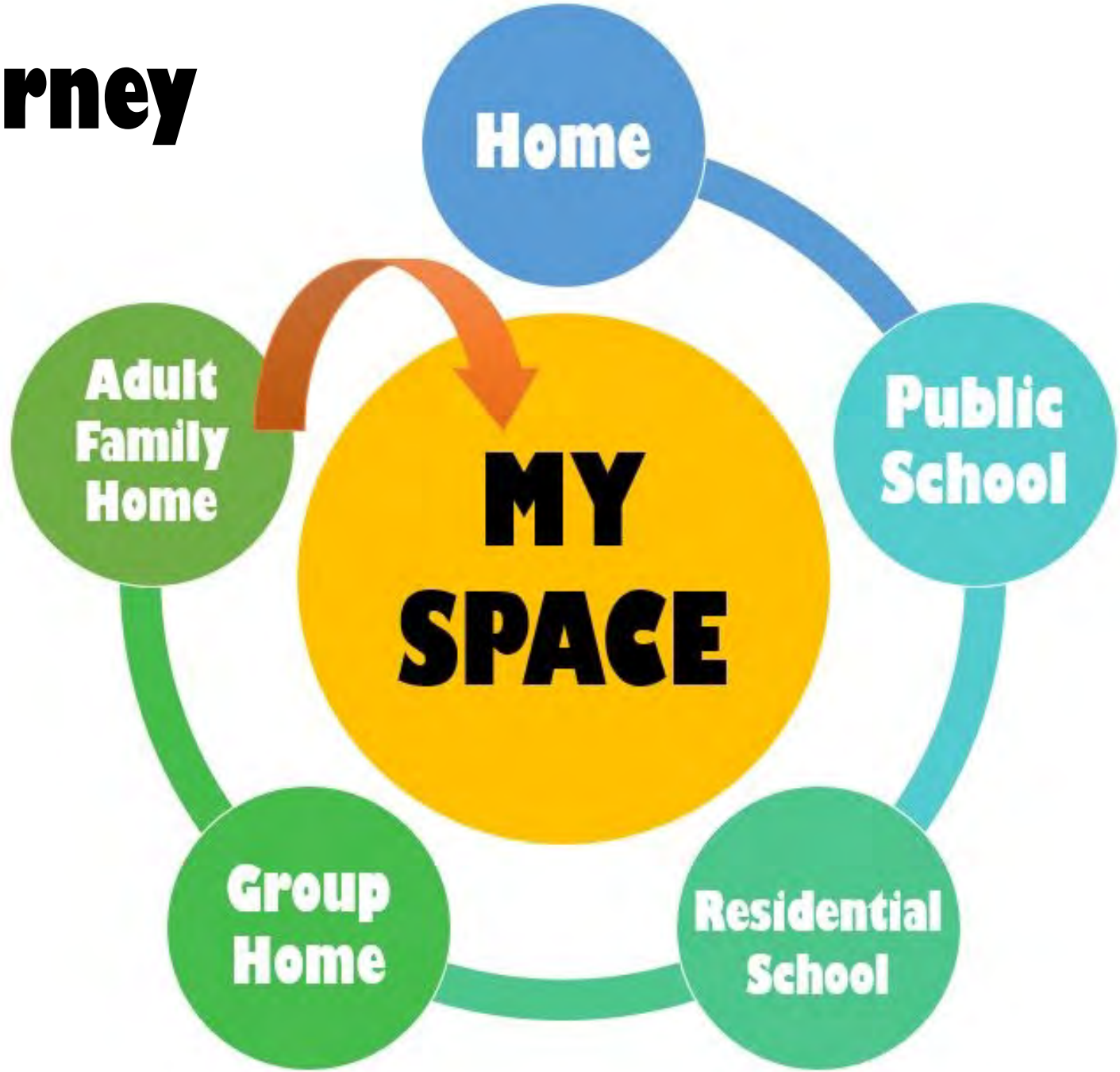
Angelman Support, Inc.

Presented by Anne and Stuart Rabin

Stuart's Graphic Map



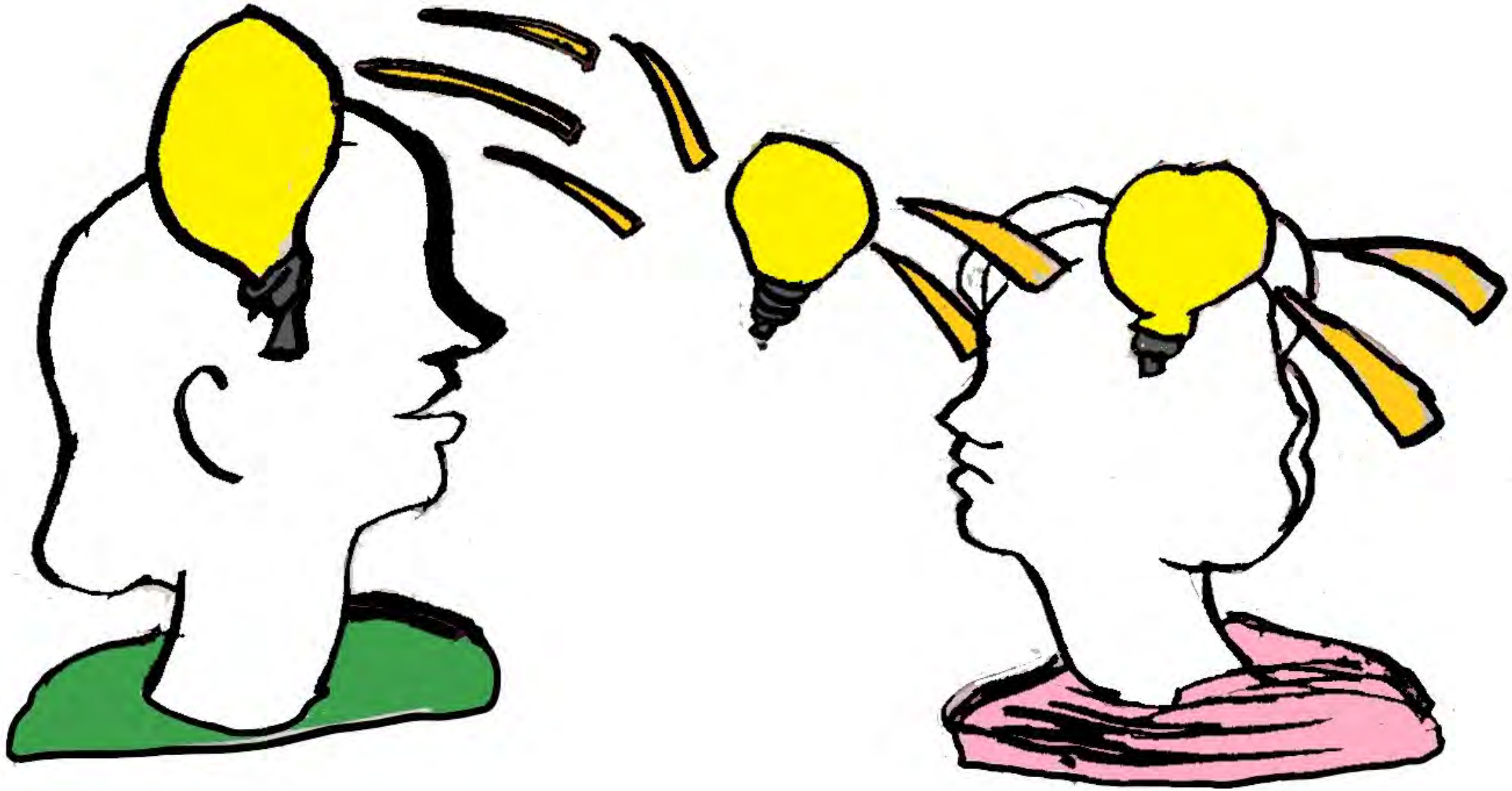
Stuart's Journey



What Stuart Wants

Challenging the System

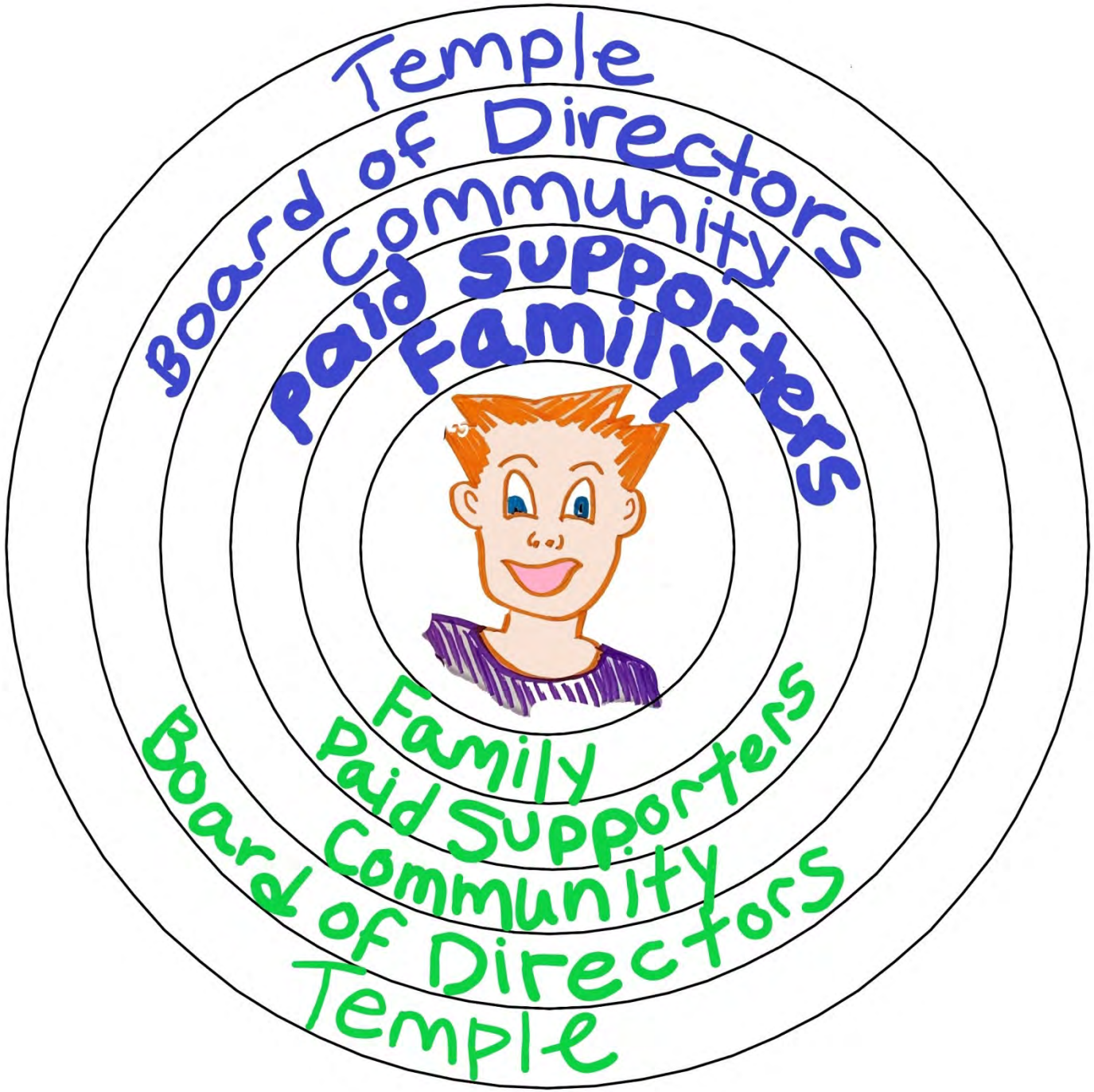
An Idea for a Solution



Stuart's Allies

The Planning Process

Stuart's Circle of Supports



Super Support

- Promise to Stuart
- Commitment to each other
- Flexibility within our team
- Optimize areas of talent
- Encourage sharing of passions/hobbies
- Extend family/friend relationships
- Create a common understanding of culture
- Professional development

Benefits of a Microboard

Learn/grow/change!

Physically Active!

Walk/Swim

Relationship!

Friendly Faces/Belonging!

Super Supporters!

Knowledgeable/Committed

Flexible/Varied Days!

Outings Galore!

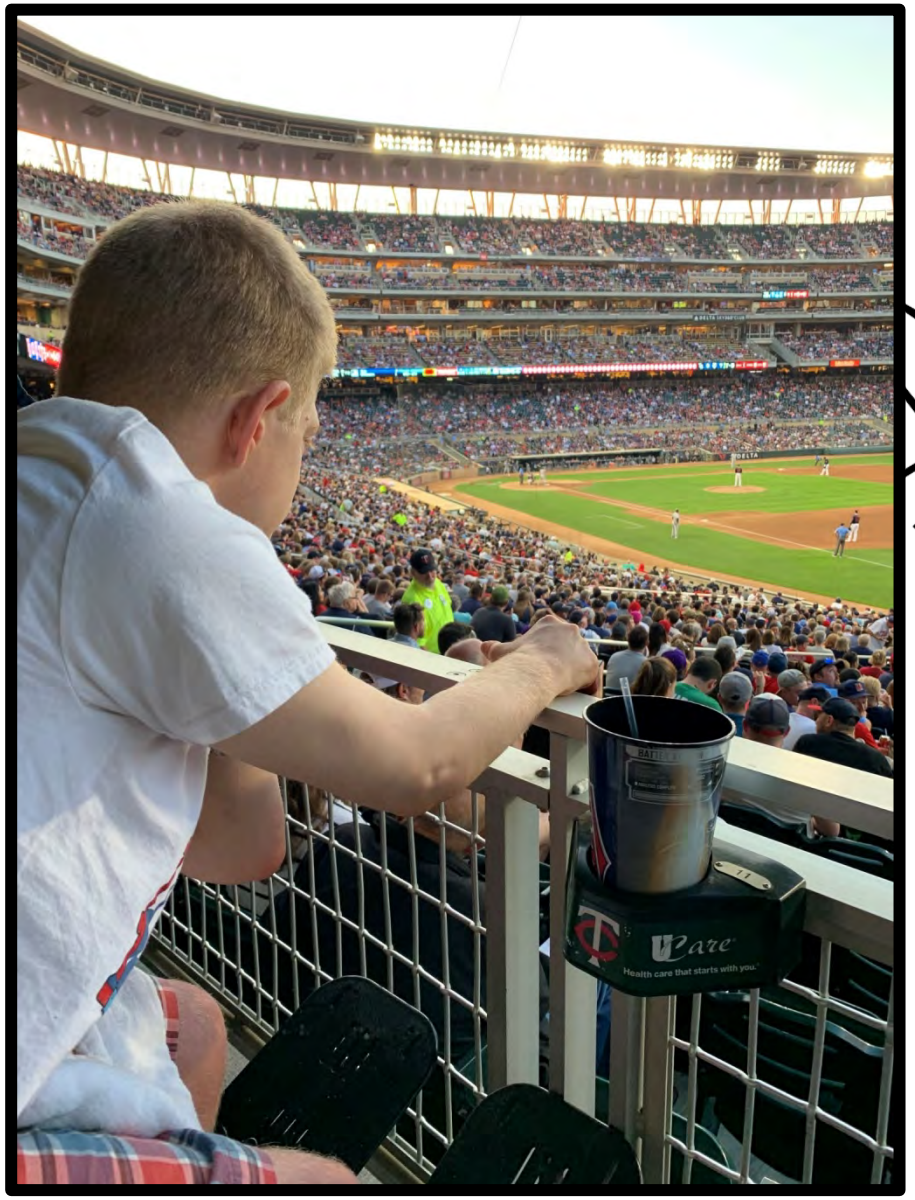
Filled with Possibilities!!

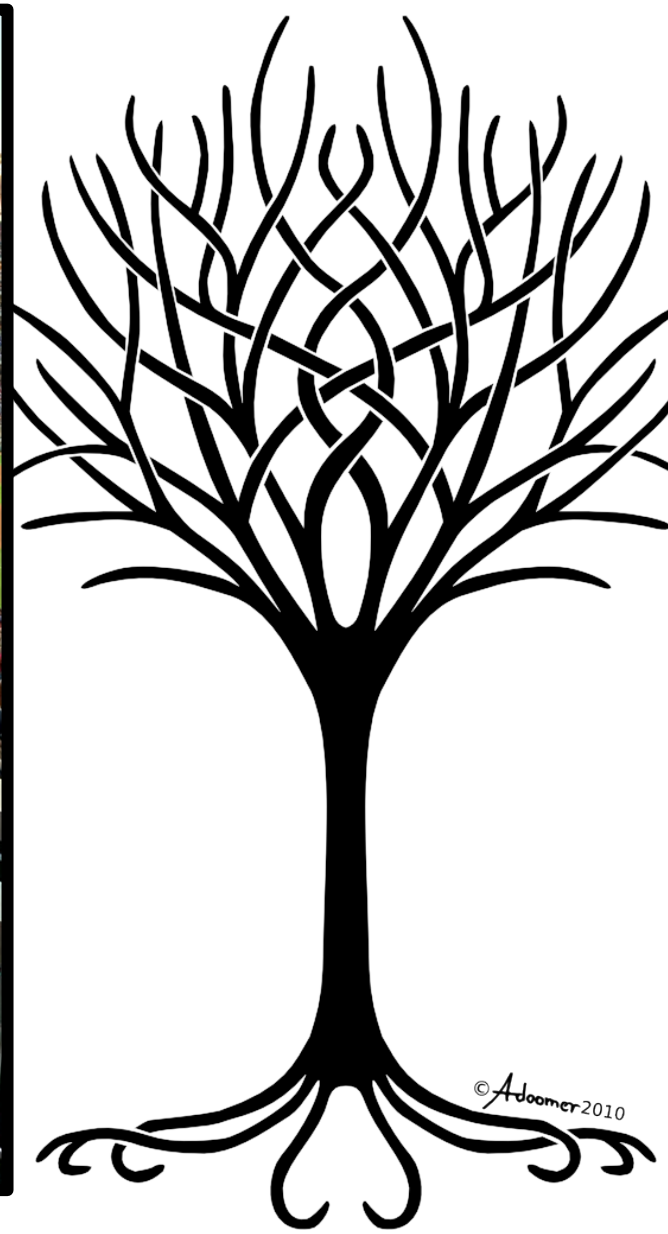
Discovering Joy

Living My Best Life

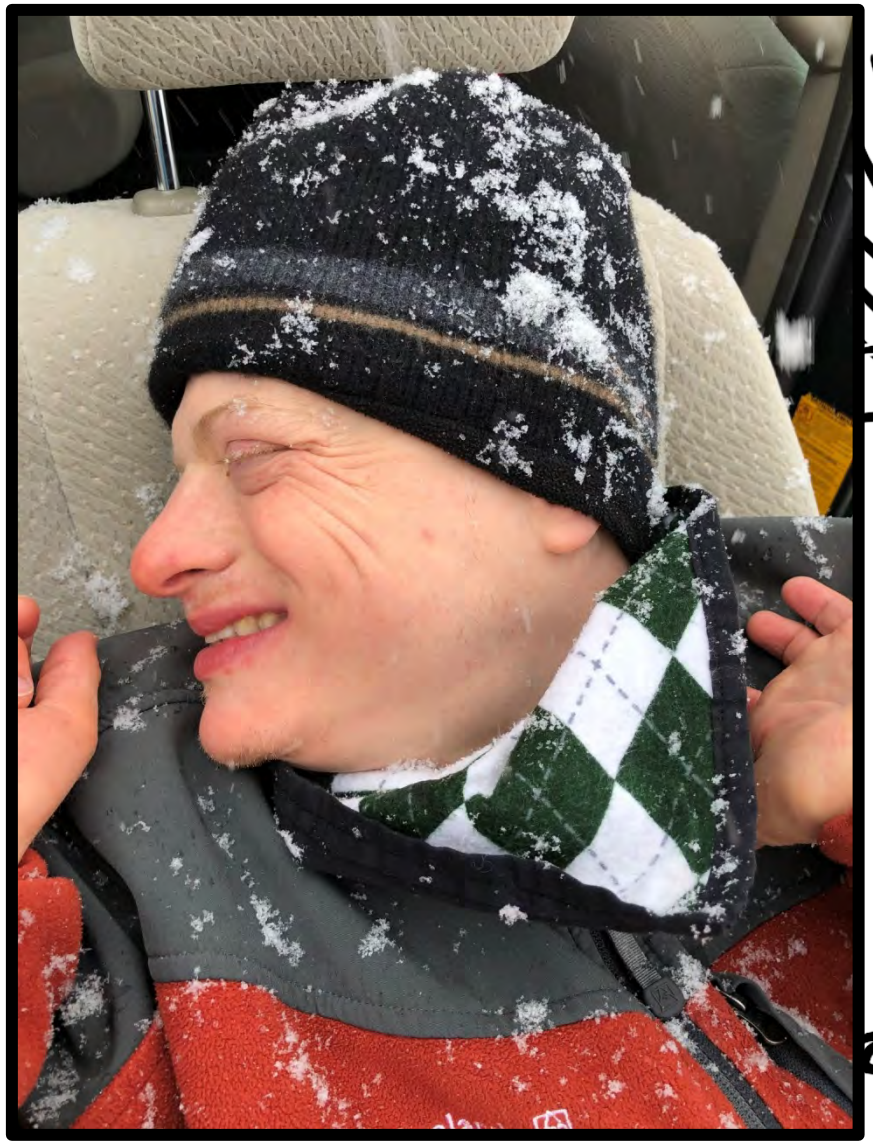
YES!!

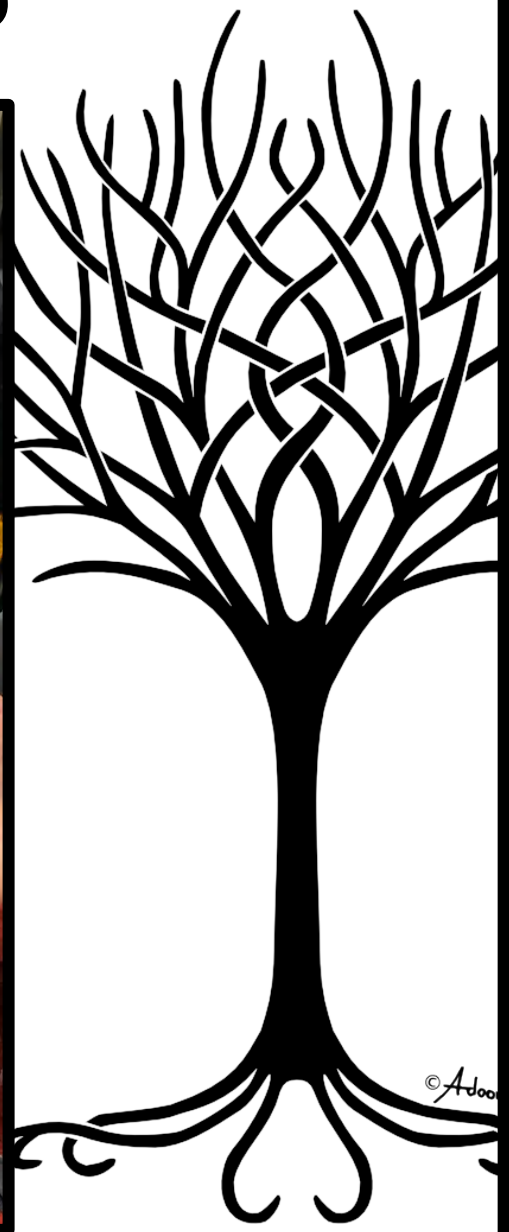
Outdoor Excursions

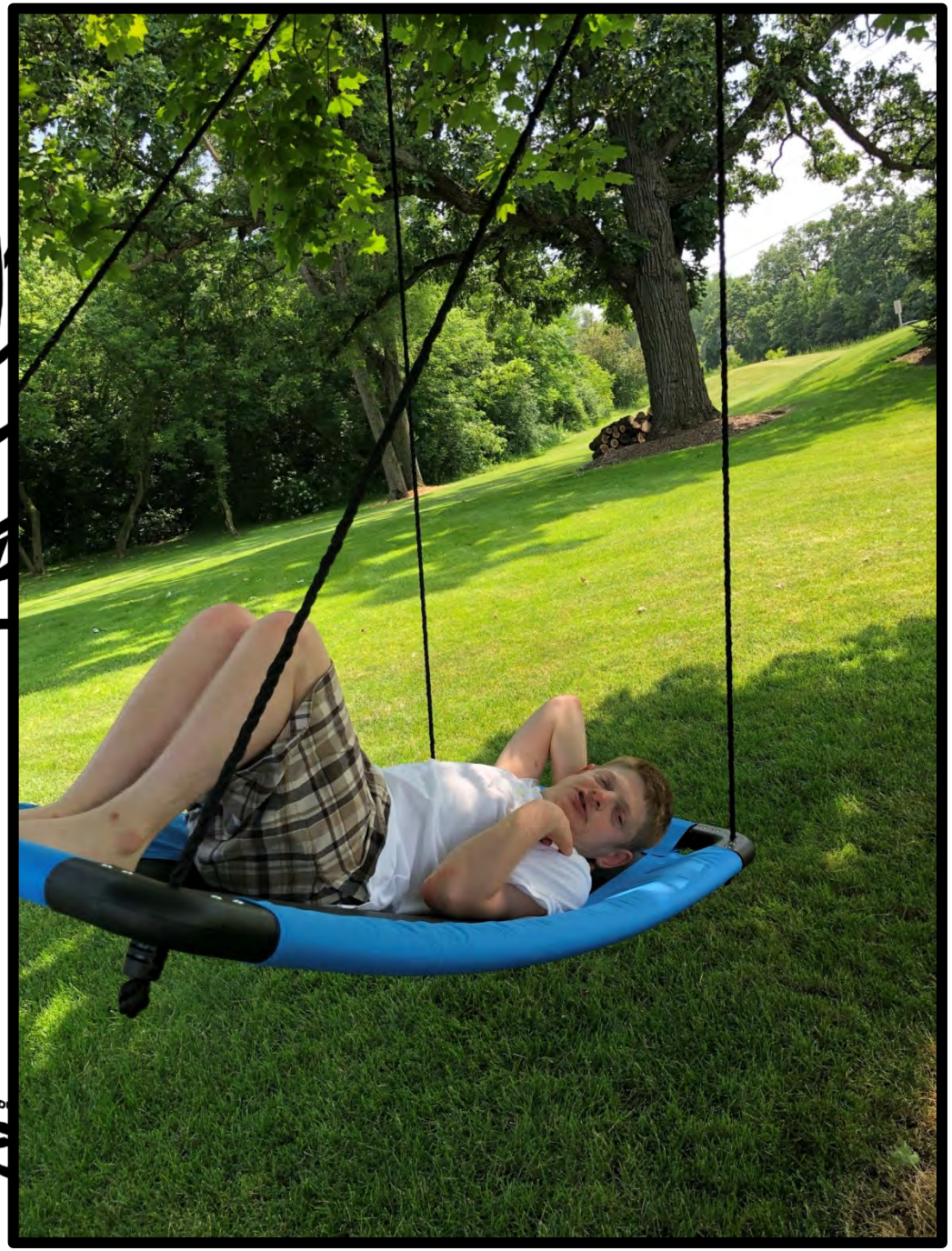




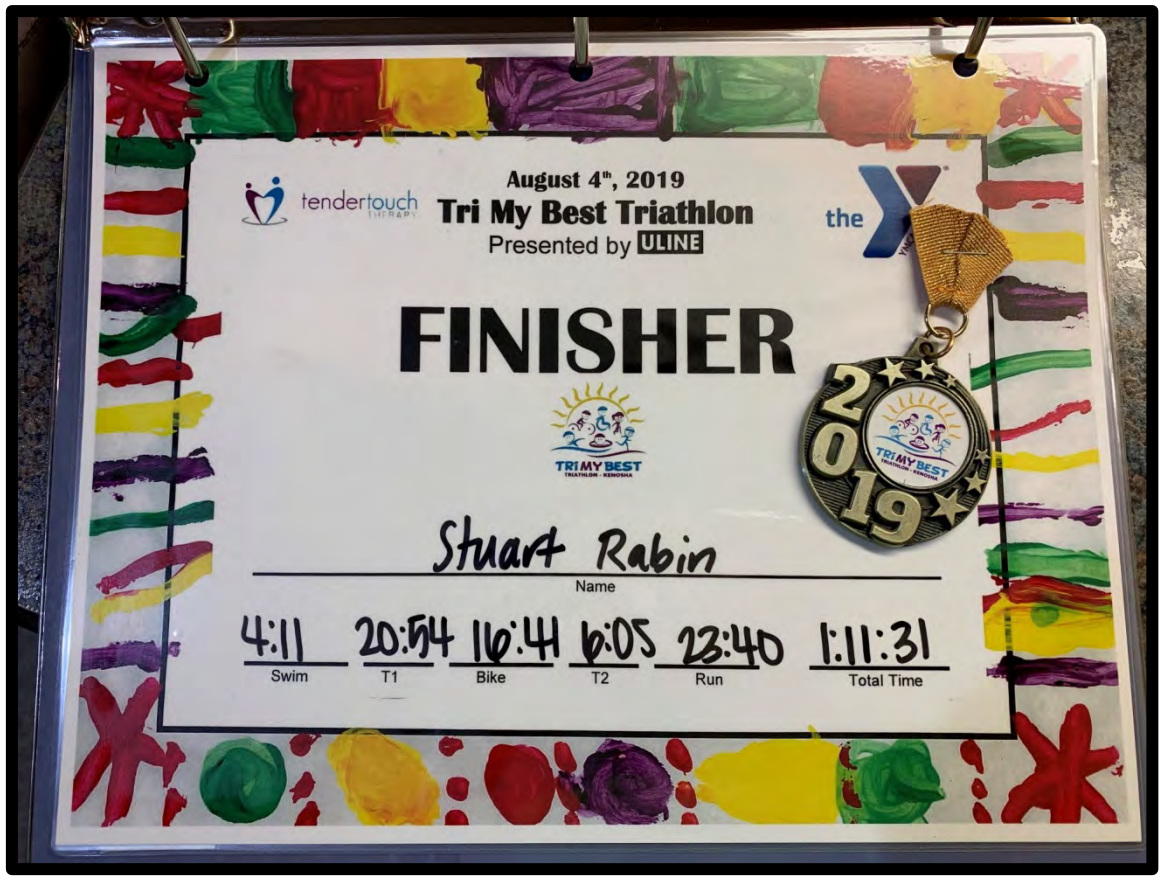
All the Seasons







5 Time Triathlete!



Fundraising Events

Kenosha Dream Playground Project

angelman SYNDROME FOUNDATION

give them a reason to smile.

Citizenship

Kindred Kitties

Puppy Love

Family Olympics 2019

Stuart – 1st Place

Human relationships are primary in all of living. When the gusty winds blow and shake our lives, if we know that people care about us, we may bend with the wind... but we won't break.

— Fred Rogers —

AZ QUOTES

Christopher, Stuart, and their families and friends remind us that we all need acceptance and understanding, trustworthy companions, valued social roles and many opportunities to contribute to the life and well-being of our communities.

Families need lifelong trustworthy sources for continuity of care and creative solution-seeking for their sons and daughters. We need strong partners to help us create good lives on a day-to-day basis.

Community partners and direct support professionals need understandable models for making meaningful differences in one person's life.

Governments and forward-looking service providers need sustainable methods for making services and supports more person-centered, family-friendly, and directed by the people and families who are being supported.

Elements of a Good Life

- Autonomy and Interdependence
- A Life that is Rich in Relationships
- Meaningful Employment
- Meaningful Contributions
- Valued Social Roles
- A Home of My Own
- Financial Security
- Continuity of Care and Advocacy
- Person-Centered Supports

A World of ‘Programs’

- Caseworkers
- Protective Service Workers
- Public or Private Guardians
- Traditional Provider Agencies
- Day Programs
- Supported Employment Programs
- Sheltered Workshops
- Group Homes
- ‘Supported Living’ Programs

Over the last twenty years or so, the states, aided by CMS and other federal initiatives, have tried a number of different approaches to changing this picture.

Some states are working to ‘re-engineer’ state-operated services and traditional provider agencies in the direction of more person-centered practices.

This is important work, but it tends to take a great deal of time, involves many moving parts, and existing service architecture may present some built-in ‘restraining forces’.

Many states may be providing individualized Waiver funding to traditional service providers.

But there’s no guarantee that a given provider can operate in a way that is fully person-centered, or that the provider can fully support self-direction.

Some states may provide individualized funding directly to the person or their family.

But these direct funds are often limited in amounts, and there are few safeguards in the event of a family member’s incapacity or unavailability as people age.

Finally, some states may engage ‘fiscal intermediaries’ to help individuals and families manage direct funds and to ensure an increased degree of accountability.

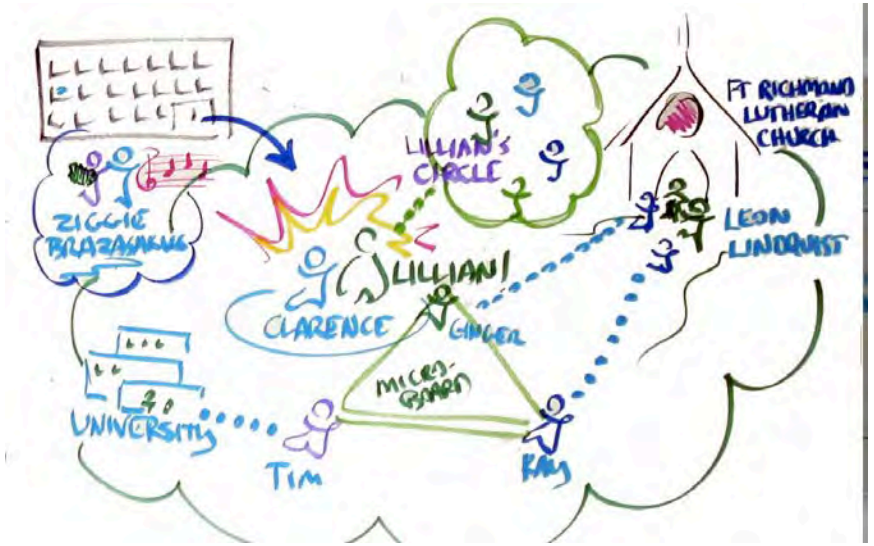
But fiscal Intermediaries often stand in the role of ‘employer of record’, making it difficult for the person and/or their family to provide effective direction to direct support workers.

There is, however, another robust person-centered option, in which the state provides direct individualize funding to a small provider organization called a ‘Microboard’.

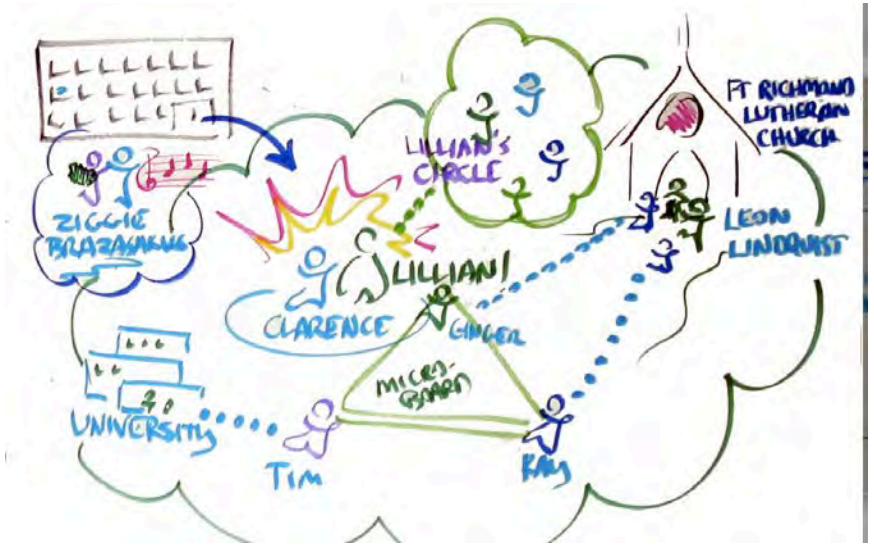
Microboards are small (micro) nonprofit corporations (boards) that are designed to serve one person.

They are designed to last a lifetime and meet the state’s needs for contract compliance, quality assurance and public accountability.

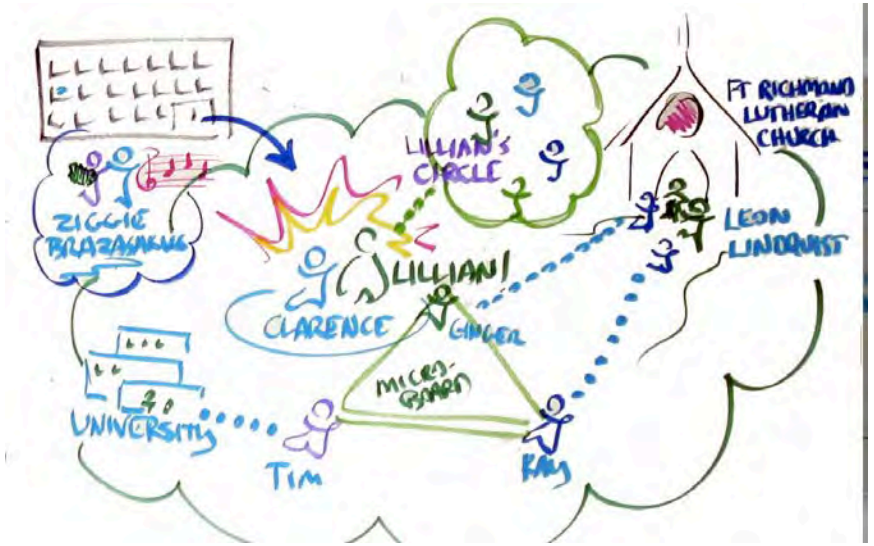
We created the first Microboard over thirty years ago.



That Microboard inspired a *movement* as people and families realized that the model would work for them and governments realized that they were working well for the people. There are now over 3,000 Microboards worldwide, including ….

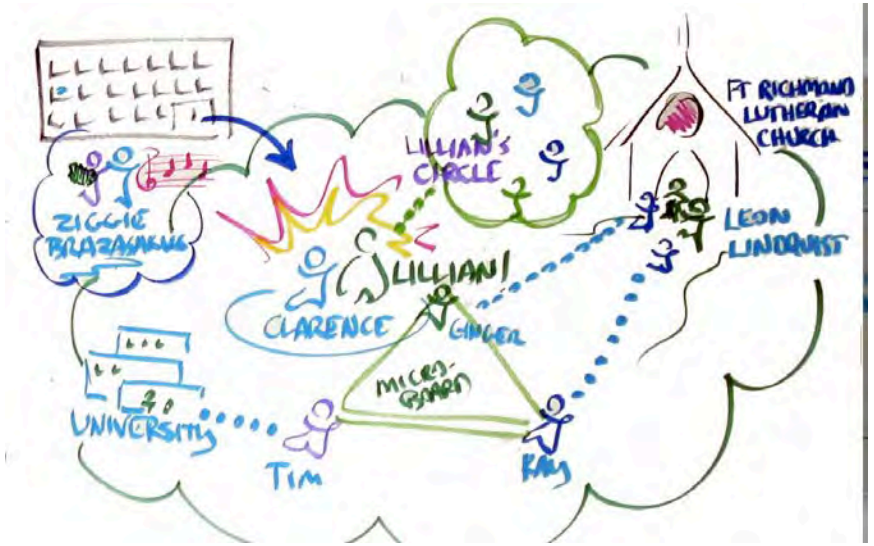


- Vela Microboard Association in British Columbia, and
- Microboard Associations in
  - Wisconsin
  - Illinois
  - Georgia
  - Tennessee
  - Australia, the UK, Norway, and elsewhere



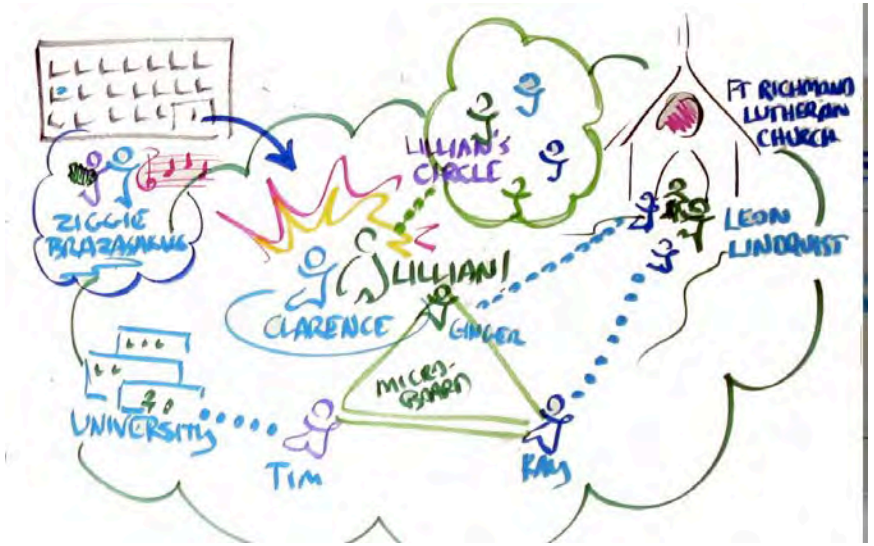
The state qualifies each Microboard as a *provider*, in the same way as it qualifies any other provider.

There is no special ‘budget line’ for Microboards.



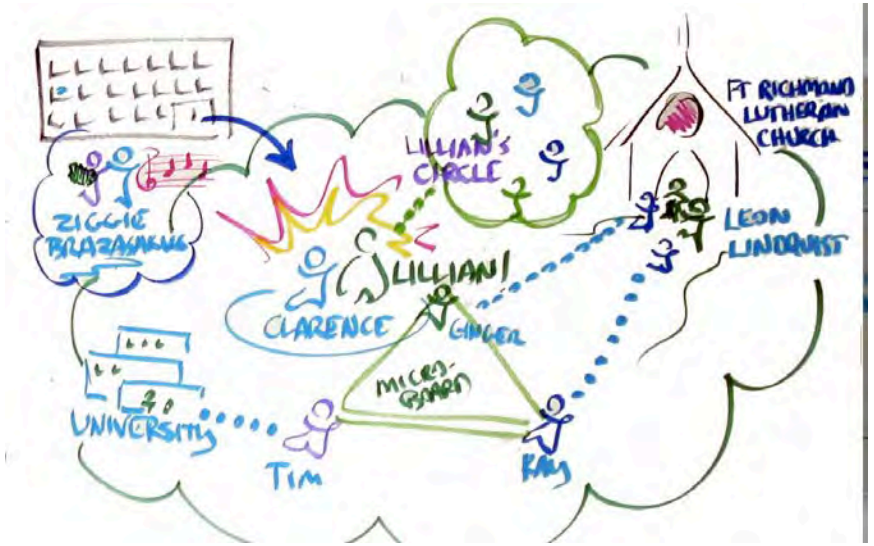
- The Microboard creates a person-centered plan and submits a program plan and budget to the state

- The state establishes a contract with the Microboard for specific services and supports

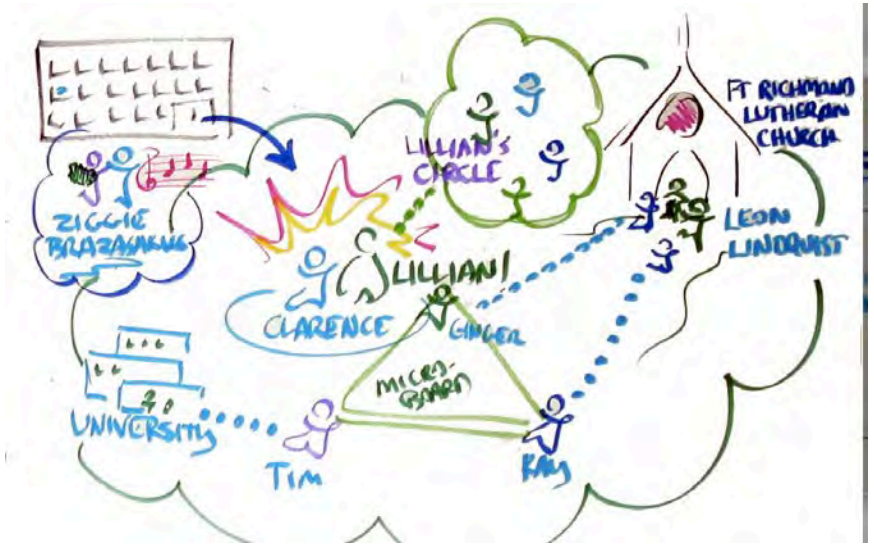


- The Microboard provides regular financial, program and outcome reports

- The state conducts routine evaluation, performance, and quality assurance reviews

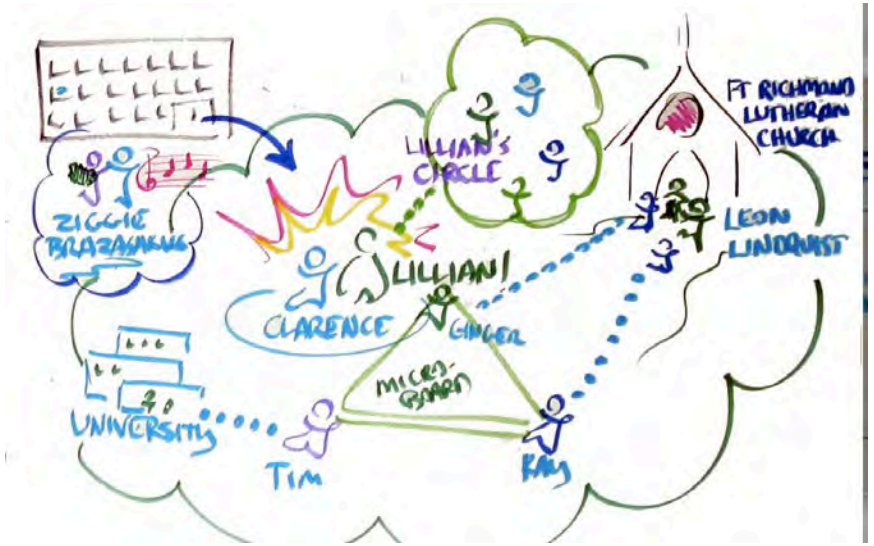


- None of this requires any changes in legislation, policy, regulation or administrative procedures.

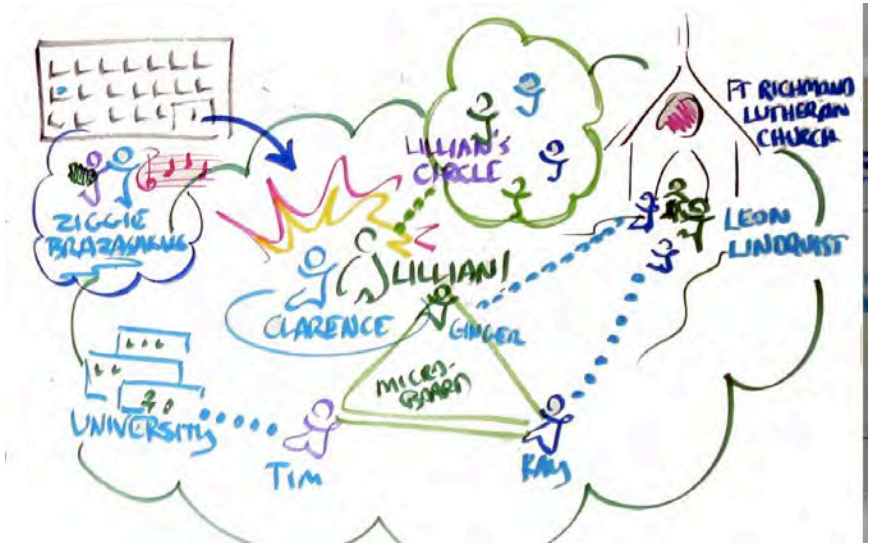


Like any other provider, the Microboard:

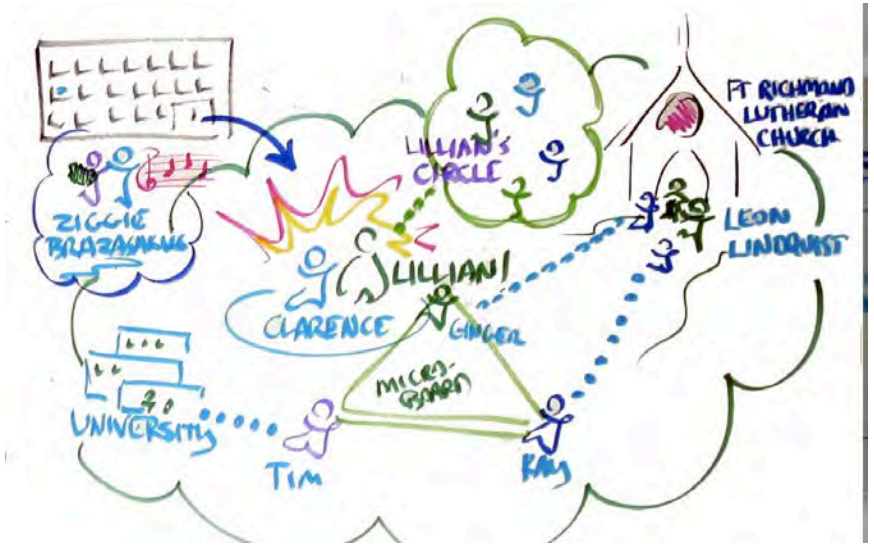
- Employs and supervises direct support workers
- Purchases goods, services, and specialized supports,
- Purchases ‘utility’ services such as payroll, benefit plans, etc.



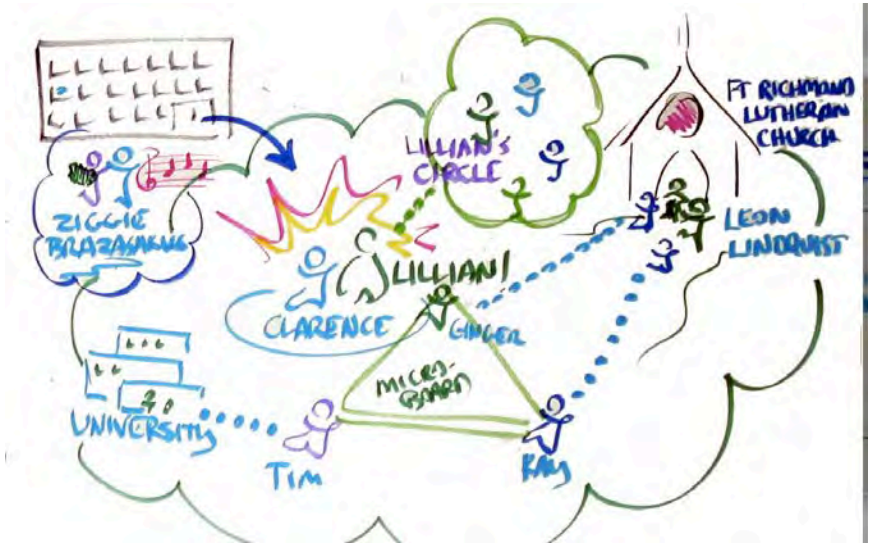
Because they serve only one person, Microboards have a number of important features that are ‘baked into’ their architecture ...



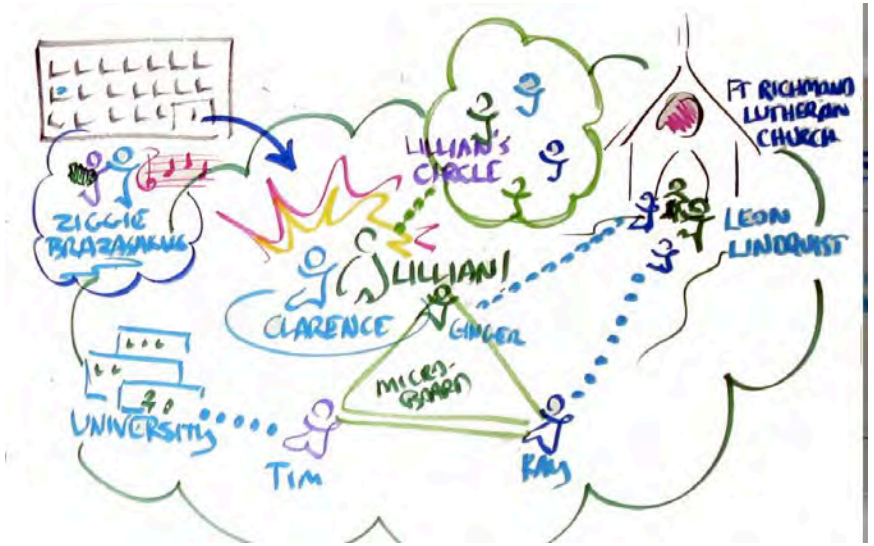
- Person-centered planning is ‘baked in’
- Planning *with* the person, their family and trusted community partners is ‘baked in’



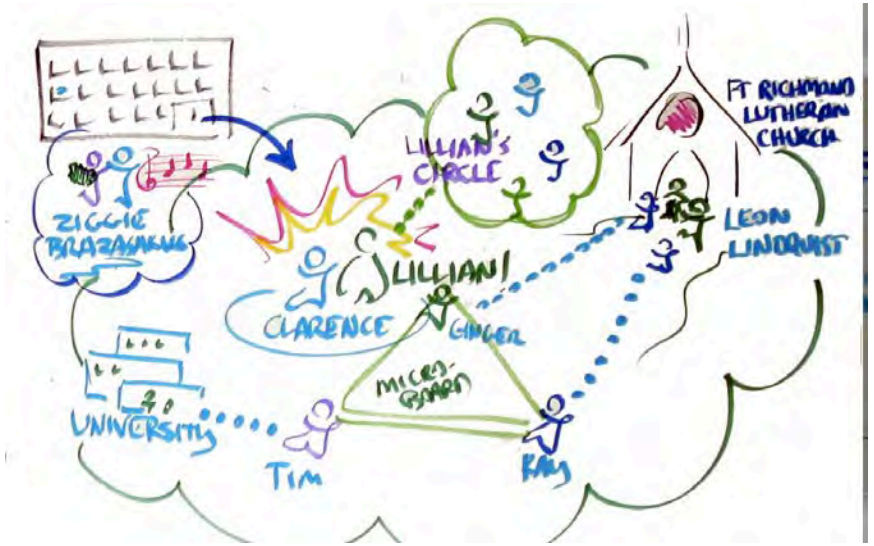
- The person and their Microboard control who provides direct support on a day-to-day basis. As one of the organizers of a state-wide Association says, “You get to control who comes in your front door.”



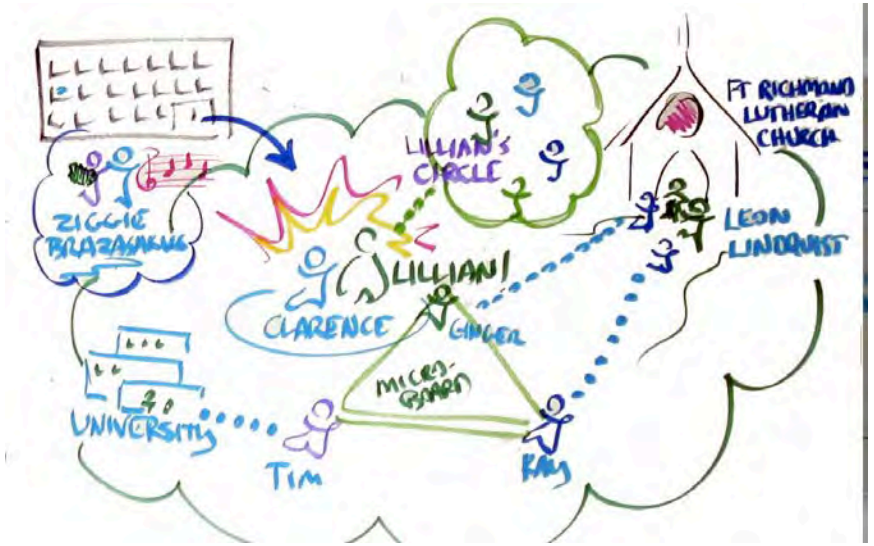
- The supported person is a full member of the governing board, receiving whatever supports he or she needs to effectively express their sense of direction.



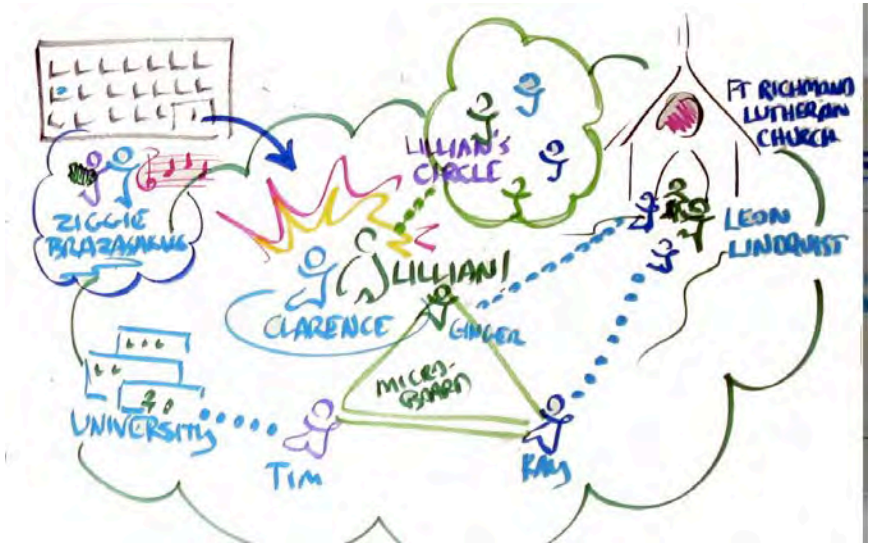
- Microboards strongly encourage and support the active involvement and engagement of community partners.



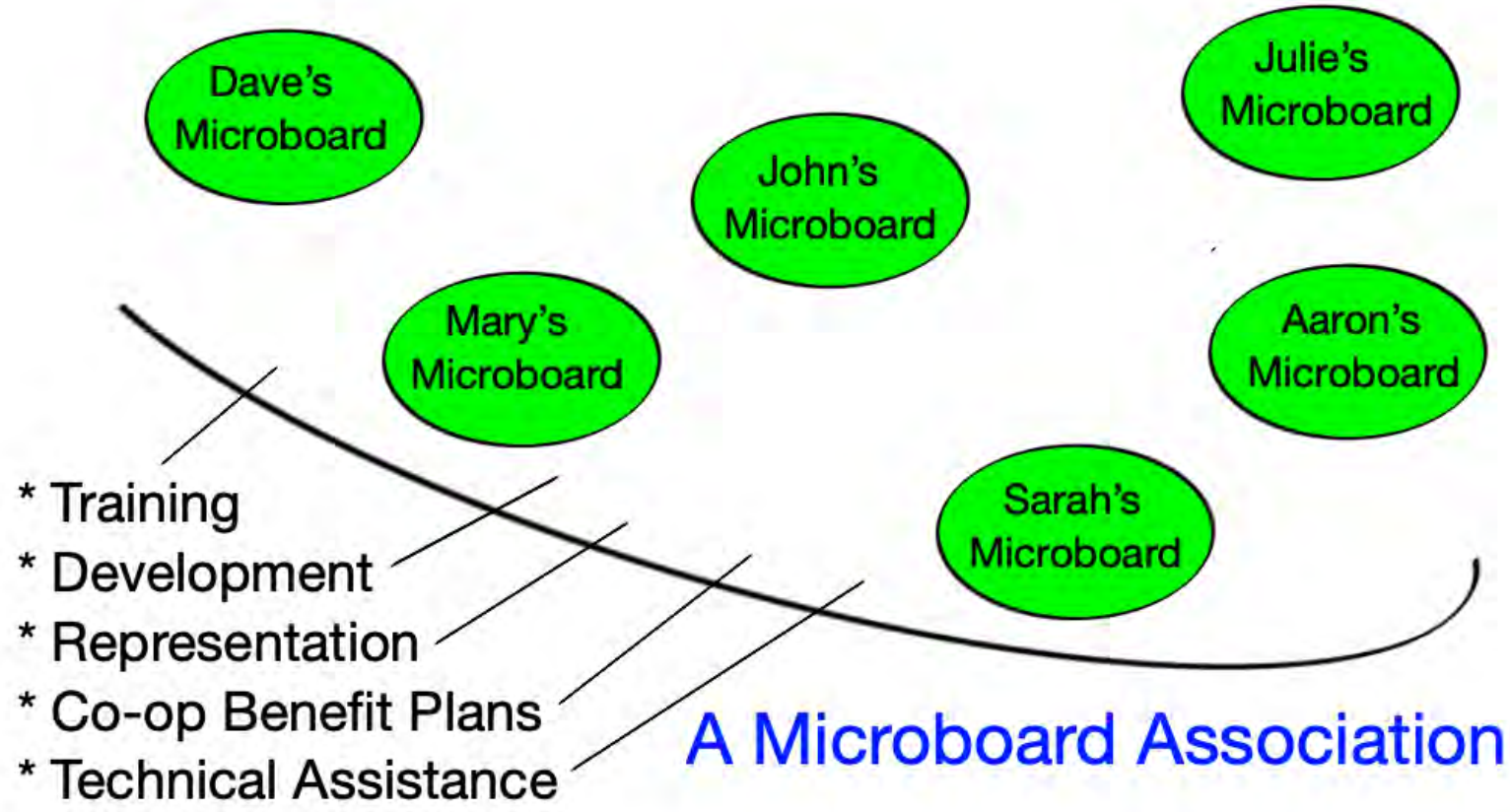
- These partners can offer invitation and membership in the community spaces in which they have standing and influence, greatly expanding the person's connections and opportunities.



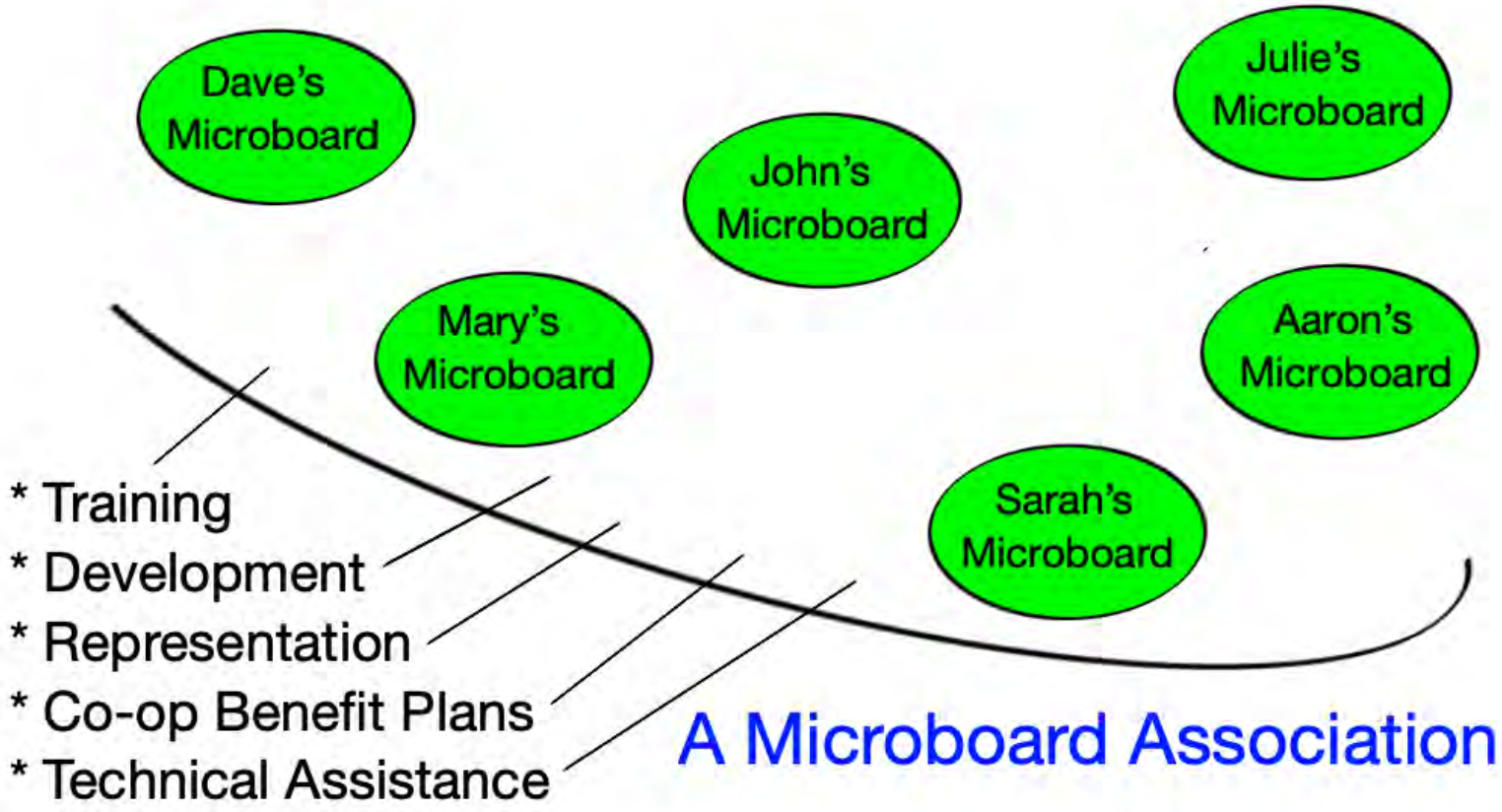
- Rapid adaptation and response is ‘baked in’, including the fact that …
- The person can move to another house without losing their supports, and
- The person can choose another provider without losing their home.



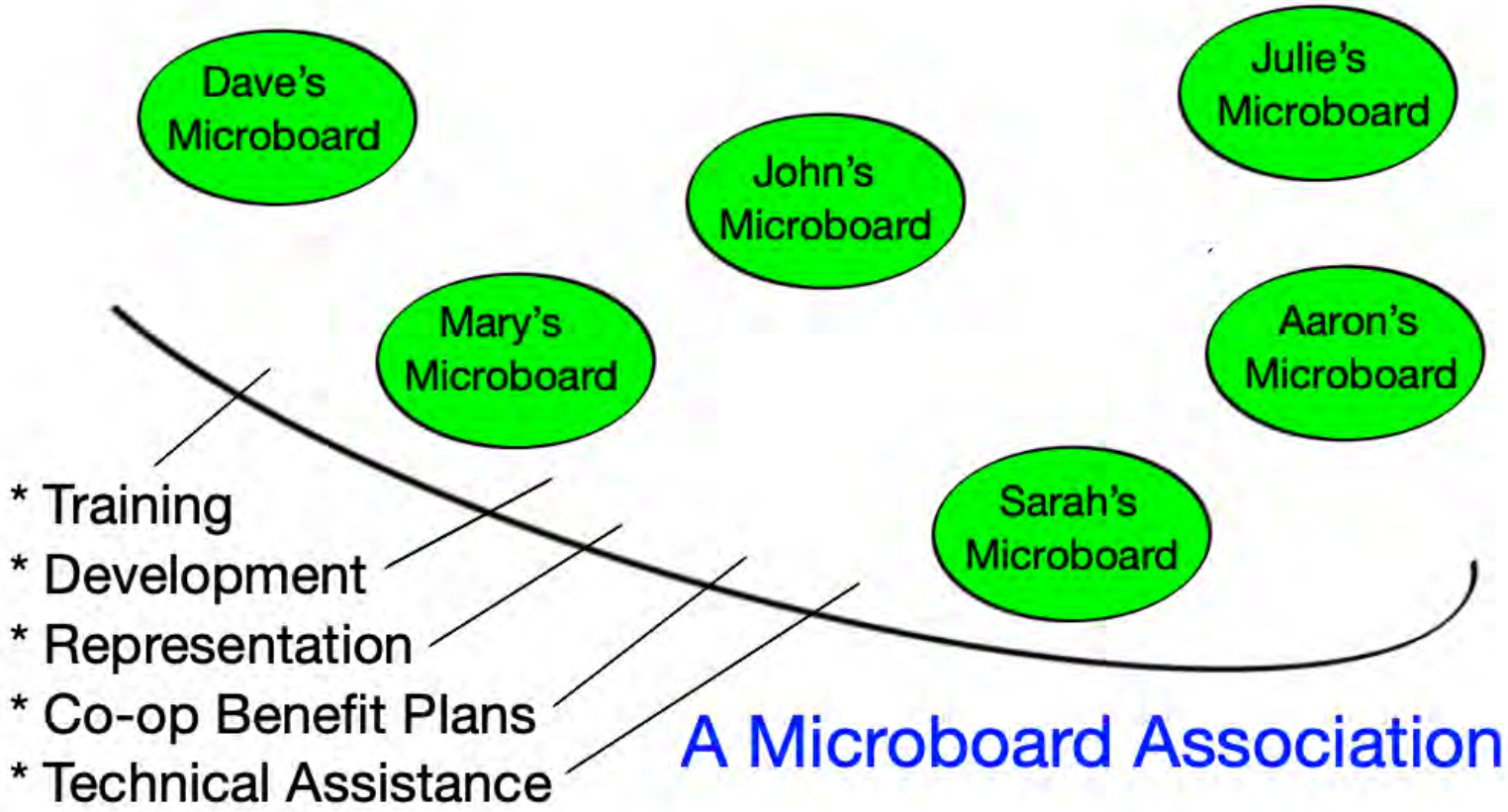
- Continuity of care, advocacy, relationships and representation are ‘baked in’
- Competition between people who are being supported is zero.
- Staff and management turnover is demonstrably reduced.



Individual Microboards are developed and supported by local, regional or state-wide Microboard Associations.

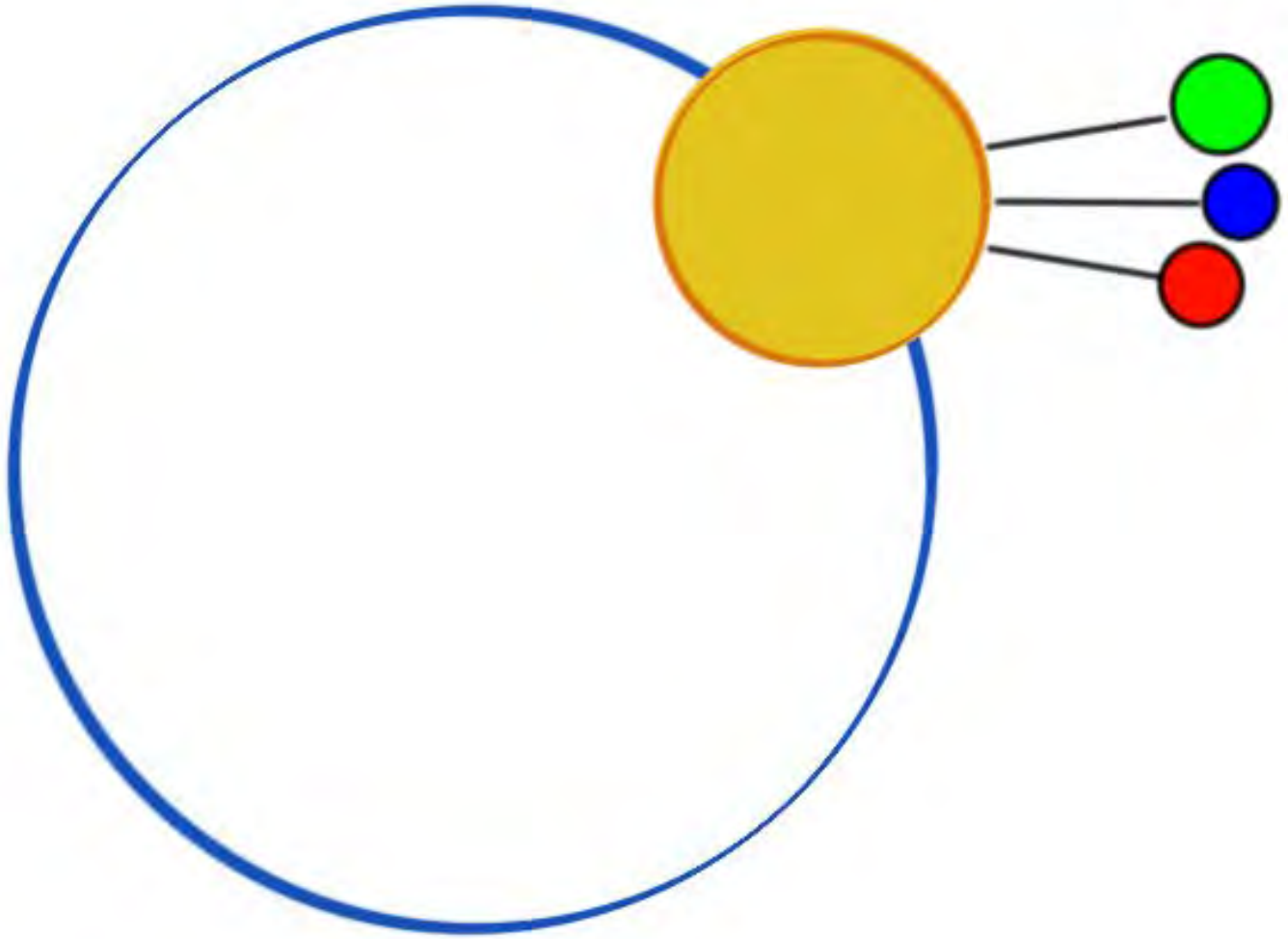


This makes it possible for Microboards to receive high-quality training and technical support and share high-quality resources such as accounting services, benefit plans, HR consultation, etc.

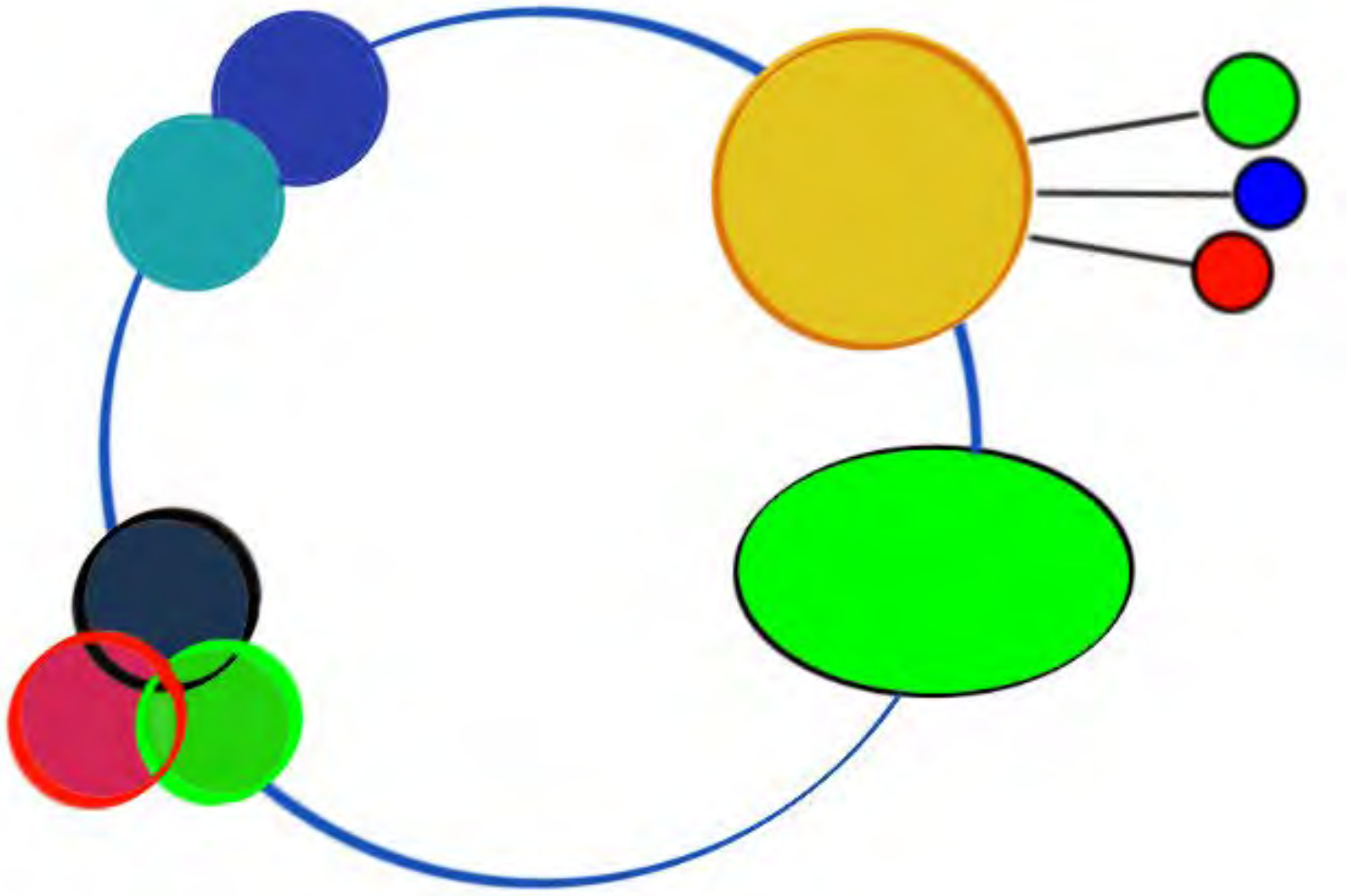


Membership in the Association is voluntary, although in some localities, states ask the Association to certify that a Microboard is in good standing and following established principles and practices.

It’s helpful to look at the ‘intersection’ of two models: the Microboard, and a robust model called the ‘Star Raft’ for developing enduring circles of support.



Every Microboard is part of a larger circle of connection, collaboration, and support that is anchored in the larger community.

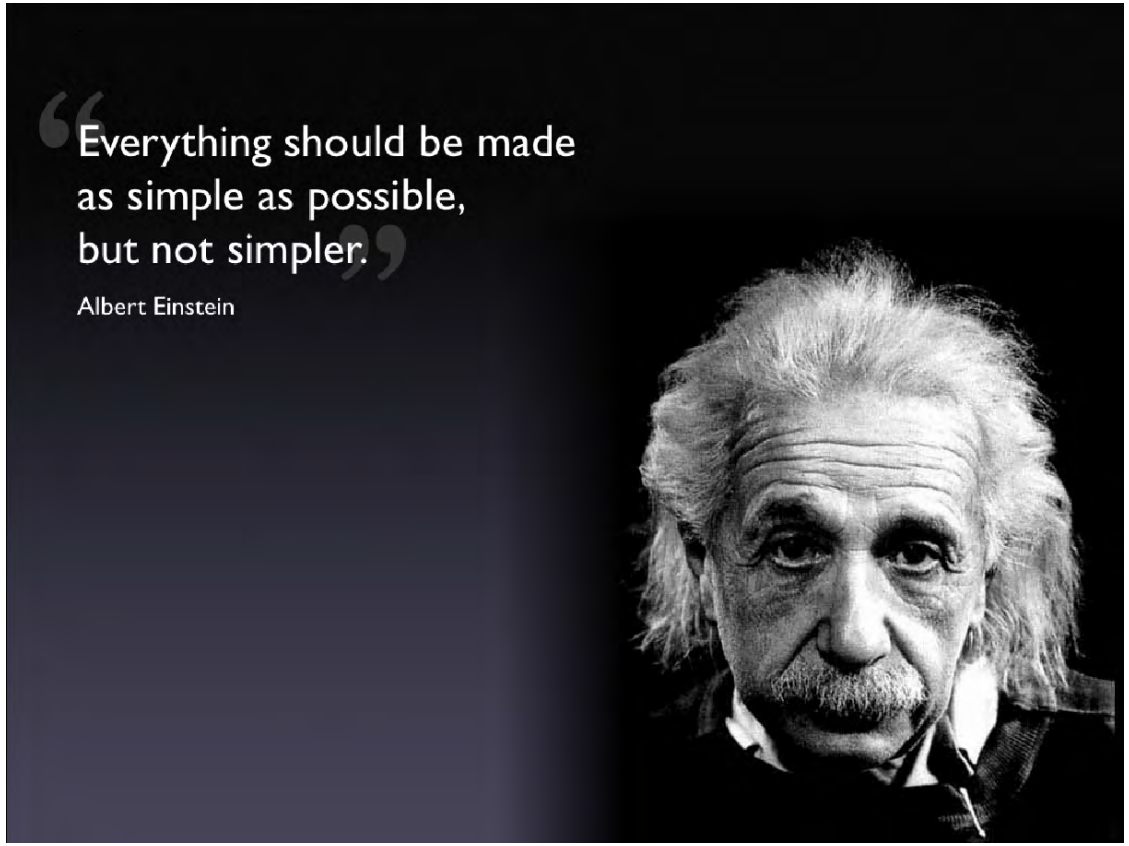


In the absence of clear design and operating instructions, a ‘circle’ can seem like one of those fuzzy ideas that is impossible to implement with any reliability.

We know that the *idea* of a circle is very important

But the *image* of a circle doesn't give us much of an idea about *how to do the work.*

Albert Einstein once said, “Everything should be made as simple as possible, but not simpler”.



So we knew we needed a model that wasn’t quite as simple as a ‘circle’

For some time, we had been looking for a pattern that had all of the *qualities* we were seeking …

… that had an understandable step-by-step *method* for building it and sustaining it

… a clear sense of *direction*

… and a metaphor that could help people understand the *roles* and *responsibilities* involved.

Finally we got a little breakthrough. We were sailing on the Lake of the Woods and someone invited us to join a ‘star raft’ for an overnight anchorage.

We learned that recreational sailors sometimes tie up in circles called ‘star rafts’ when they want to anchor *in community*.

We thought that this pattern might be a useful metaphor for the circles we were trying to build.

It occurred to us that this …

… might be like this

The star raft is based on a nautical tradition of hospitality

People sharing connections and what they ‘carry on board’

Helping new sailors ‘learn the ropes’

Deciding how they will manage any hazards up ahead

Identifying interesting places to visit

And planning the next adventure together.

The star raft starts with an *invitation*, and it's built one boat – one conversation – at at time

Each new person brings new opportunities, insights, connections and capacities

Each has different interests and ‘standing’ in different places, so more opportunities show up

The shape creates a space in the middle where it’s safe to swim, because everyone’s in view and everyone is always within reach

People can see, encourage and support one another

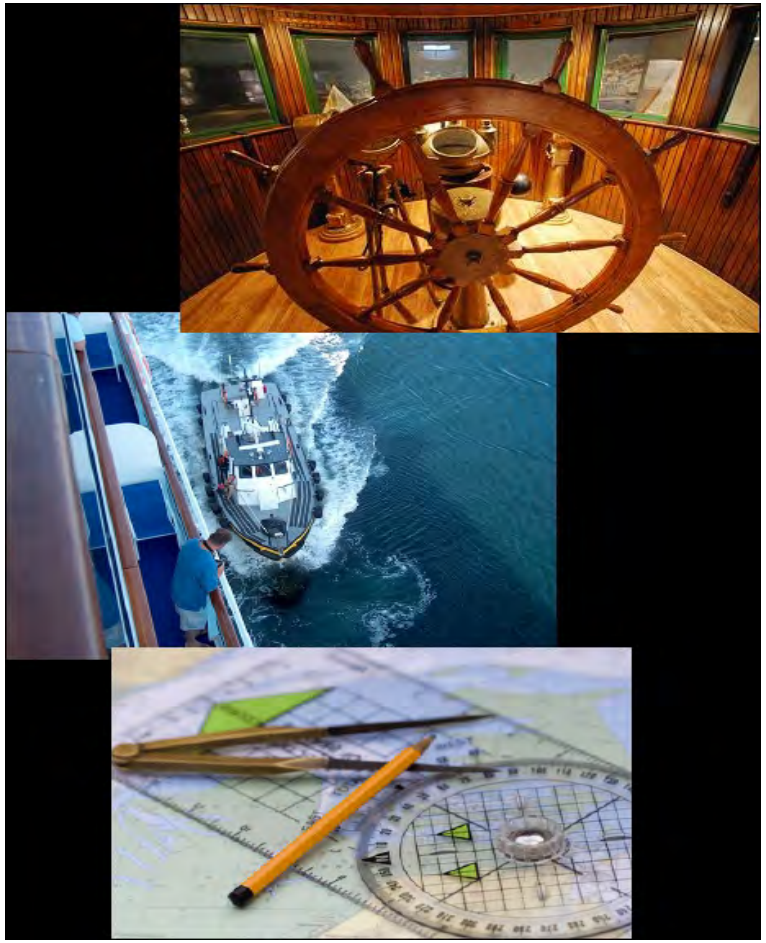
They feel accountable to the person at the centre and to the group

They see the need for continuity, so they naturally keep adding new people

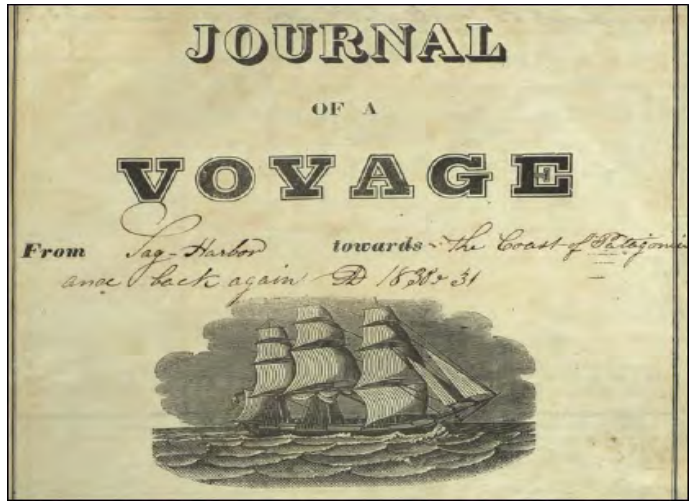
There’s a sense of energy, creativity and celebration.

And there are more people to share the work

The nautical metaphor offers some interesting ways to think about the roles that need to be filled



The Owner
The Skipper
Navigator
Map-Maker
Log-Keeper
Radio Operator
Safety Officer
Hospitality Officer
Harbor Pilot



Eight Essential Nautical Roles

In a single-handed sailboat, one person is responsible for filling *all* of the roles that are essential for safe and happy sailing: Owner, Skipper, Navigator, Radio Operator, Safety Officer, Harbor Pilot, and so on. In a larger boat, a family or a Star Raft circle, it's important for each of these roles to be filled and ultimately for lots of people to be good at these jobs.

Essential Nautical 'Roles'

The Owner

It's important to be clear about the difference between the 'owner' of a boat and its 'skipper'. The Owner says *where the boat is going*. The Skipper takes responsibility for getting us there, keeping everyone safe, and organizing the contributions of the crew and passengers. In a Star Raft, the 'focus person' is always considered to be the Owner.

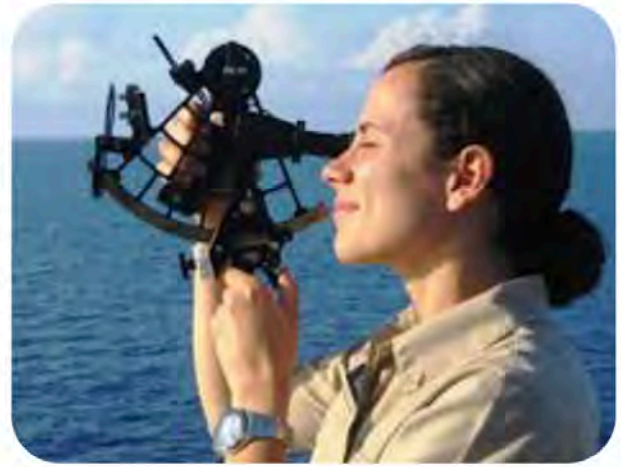
Essential Nautical 'Roles'

The Skipper

When there's an agreement that people will share the nautical roles, the Skipper has ultimate responsibility for 'safe passage'. She has authority to organize everyone's work and responsibility to keep everyone safe on the water. In the long run, Star Raft circles work best when people take turns and get experience in all of the roles - especially the role of Skipper.

Essential Nautical 'Roles'

The Navigator



The Navigator keeps track of where we started, where we're headed, where we are at the moment, what obstacles or traffic might lie ahead, and what course changes will get us from where we are now to where we're going. This is never about criticism or blame, so the Navigator has a kind of 'diplomatic immunity'. It's helpful to take turns in this role.

Essential Nautical 'Roles'

The Radio Operator

Think about the role of the Radio Operator as keeping everyone connected and informed about what's going to happen next. These days, we use email and instant messaging, but the role is the same. On the water, the Radio Operator has an additional important role - that of sending out distress signals and listening for other vessels in distress.

Essential Nautical 'Roles'

The Log-Keeper

In a Star Raft (and in life), it's often very helpful to keep a 'journal' - a record that allows us to reflect on our experience, learn from our history, and celebrate how far we've come. Keep a vivid graphic and verbal record of the journey - useful for learning, teaching future members, and sharing the story. With today's technology, you can use words, videos, drawings!

Essential Nautical 'Roles'

The Map-Maker

The early explorers sailed in uncharted territory, and they *always* made maps that allowed them to return home safely and make future journeys faster and easier. We now have tools that allow us to 'map' our connections and communities and quickly capture 'windows of opportunity' - people and places that pop up in conversation that we might miss unless we map them.

Essential Nautical 'Roles'

Chief Steward

A wise person once said, "If you feed them they will come", and if we share this job around, Mom won't have to do all the baking. Hospitality, in its original sense, means 'friendliness to guests'. More than food, it connotes a sense of welcome, safety, comfort, and appreciation. It's important to have someone responsible for thinking about this and making it real in every gathering.

Essential Nautical 'Roles'

The Harbor Pilot

When a big ship approaches a harbor, a Harbor Pilot will approach in a little boat, board the big ship, and skillfully navigate through shallows that the pilot knows well. This role comes into play when we need someone who can help us find our way into one of the community's Sweet Places. Find someone who already has standing in that place, and invite them into this role.

Essential Nautical 'Roles'

Share these jobs around!

In sailing, in life, and in a Star Raft, we're bound to be safer, happier and having more fun if everyone on deck has a working knowledge of every job, can do any job in a pinch, and feels competent and confident about what they're doing. People *will come and go, so* continuity is important and practice is essential. So share these jobs around!

Essential Nautical 'Roles'

The Star Raft pattern includes very clear descriptions about what we are asking people to do and step-by-step instructions for making those invitations:

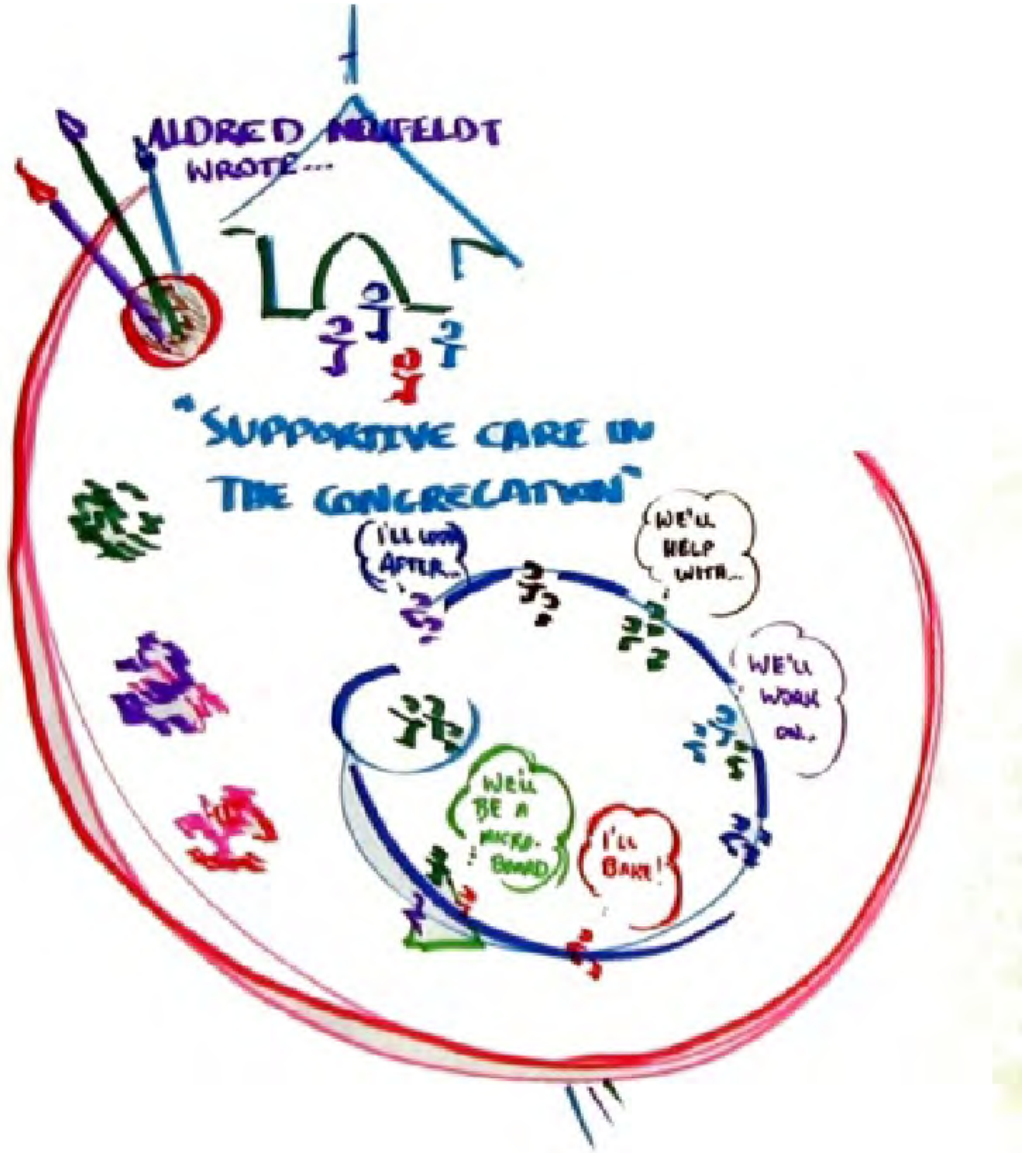
Introduce us to people whom you already know and trust, and who know and trust you.

Systematically identify and mobilize the gifts and capacities of the person at the center

And ‘follow the threads’ of the person’s interests and gifts in the direction of *connection, companionship and contribution*

Look for the ‘sweet places’ in community

Be *in relationship* - become part of the person’s life, and welcome him as part of yours



Make an agreement to be tied in for ‘a while’

Bring other trusted people into the picture

Make and keep agreements on ‘major safeties’, balancing what’s important-to and important-for the person

Serve as a connector to community spaces in which you already have have ‘standing’

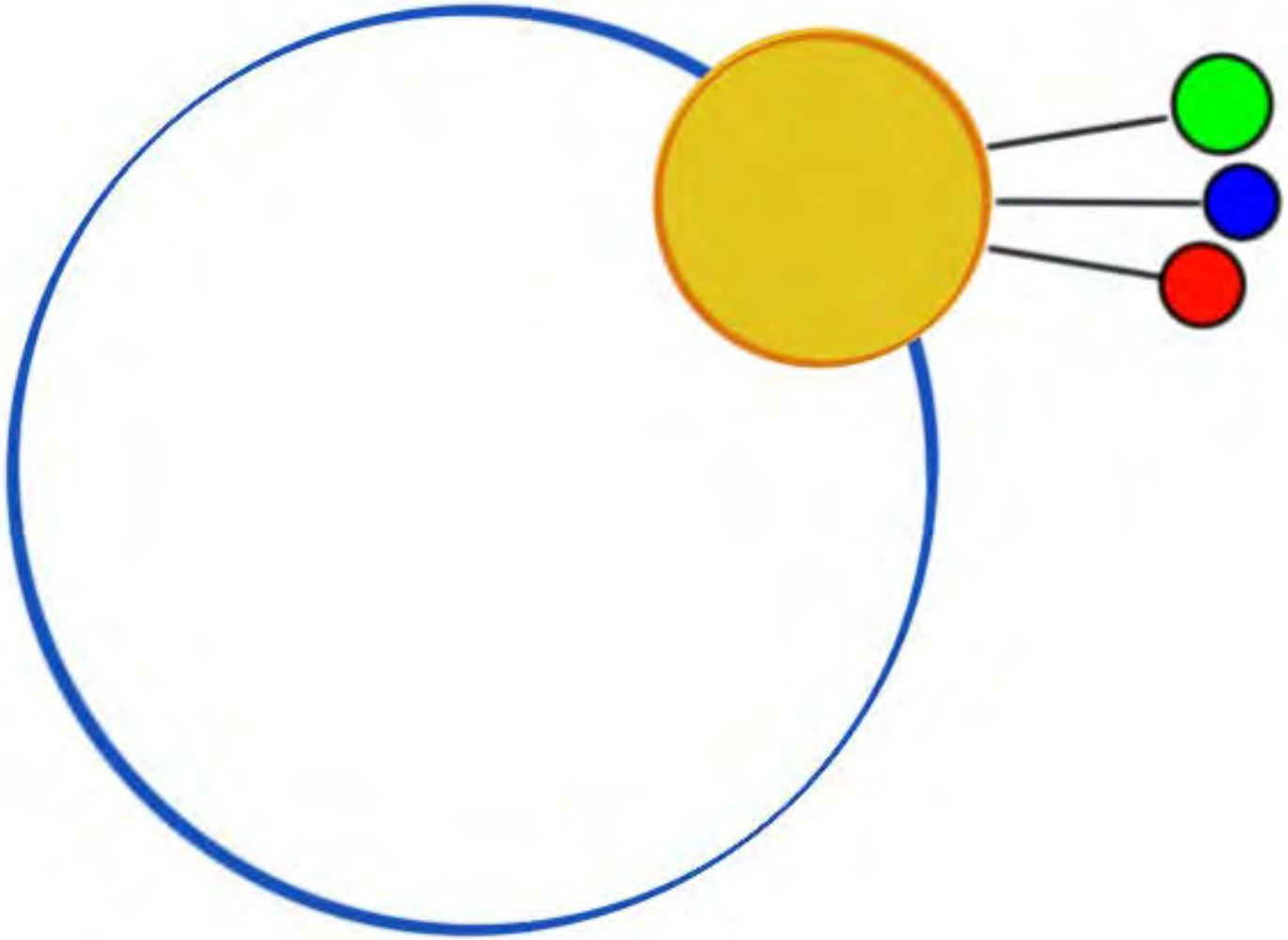
Remember that every person in every one of these places ...

...can lend their connections to anyone else

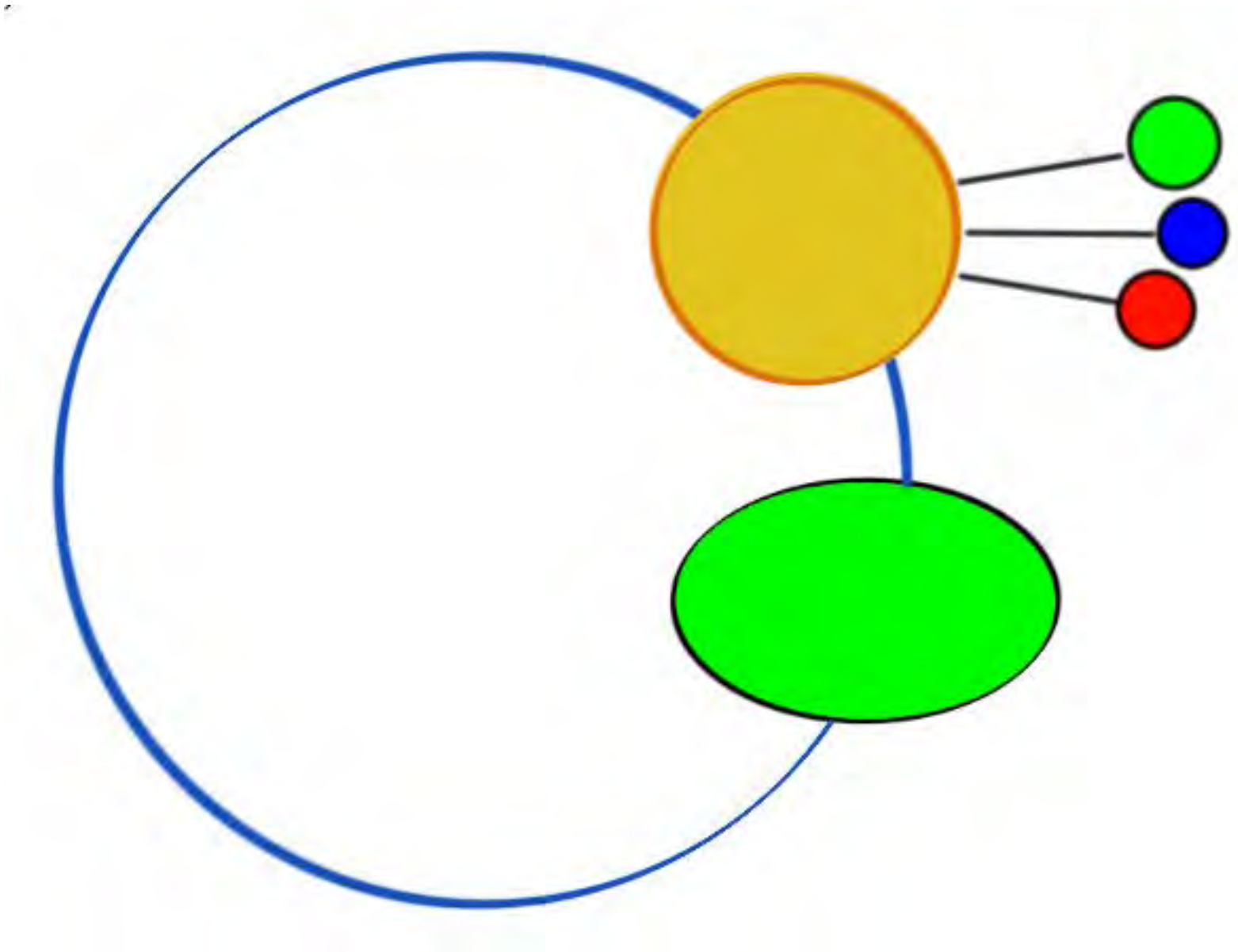
So every thread we follow ...

Leads Here !
Interests
Associations
Family
Workplaces
Skills / Capacities
Friends
US Army Reserve
Mal Preston
Classmates
Strata Members
Maurice Adair
Gloria (Bill's friend)
Tony and Evelyn
Jack Markewicz
Socially Engaged
Kurt Petersen
Tony Dunn
Wendy Partridge
Jack Pealer
Don Trites
Artist
Anne O'Bryan
Co-Workers
Vendors
Computer
Sumant Anthw
Start with one perso
Across a Crowded Roo
Online Training and
Cathy Hollands
Nicola Schaefe
Linda Hill
(Pam Landon)
Teachers
Booked
Shawn MacDougall
Mark Friedman
Sailing
Joe Hirsch
Al Etmanski
Pat Beeman
Disability-Focused
Colleagues in Allied Businesses
Mary Cerreto
Photographer
John O'Brien
Vickie Cammack
Connie Lyle O'Brien
Jack Pearpoint
Holly Bohling
Jill Rogers
Bob Perske
Builder
Carmine Vara
Steve Miller
Joe Wykowski
Lynda Kah
Jeff Strully
Person-Centered Plan
Richard Amado
David Hingsburger
Pattern Language
Paul Cook
Web-Builder
Photography
Tim Krause
Deb Wisniewski
Star Raft Worldwide
Jack Hillyard
Beer Stoneshankscher
Mike Green
Dennis Harkins
Bill Murphy
Worker Cooperatives
Tennessee Microboards Ass...
David Yeite

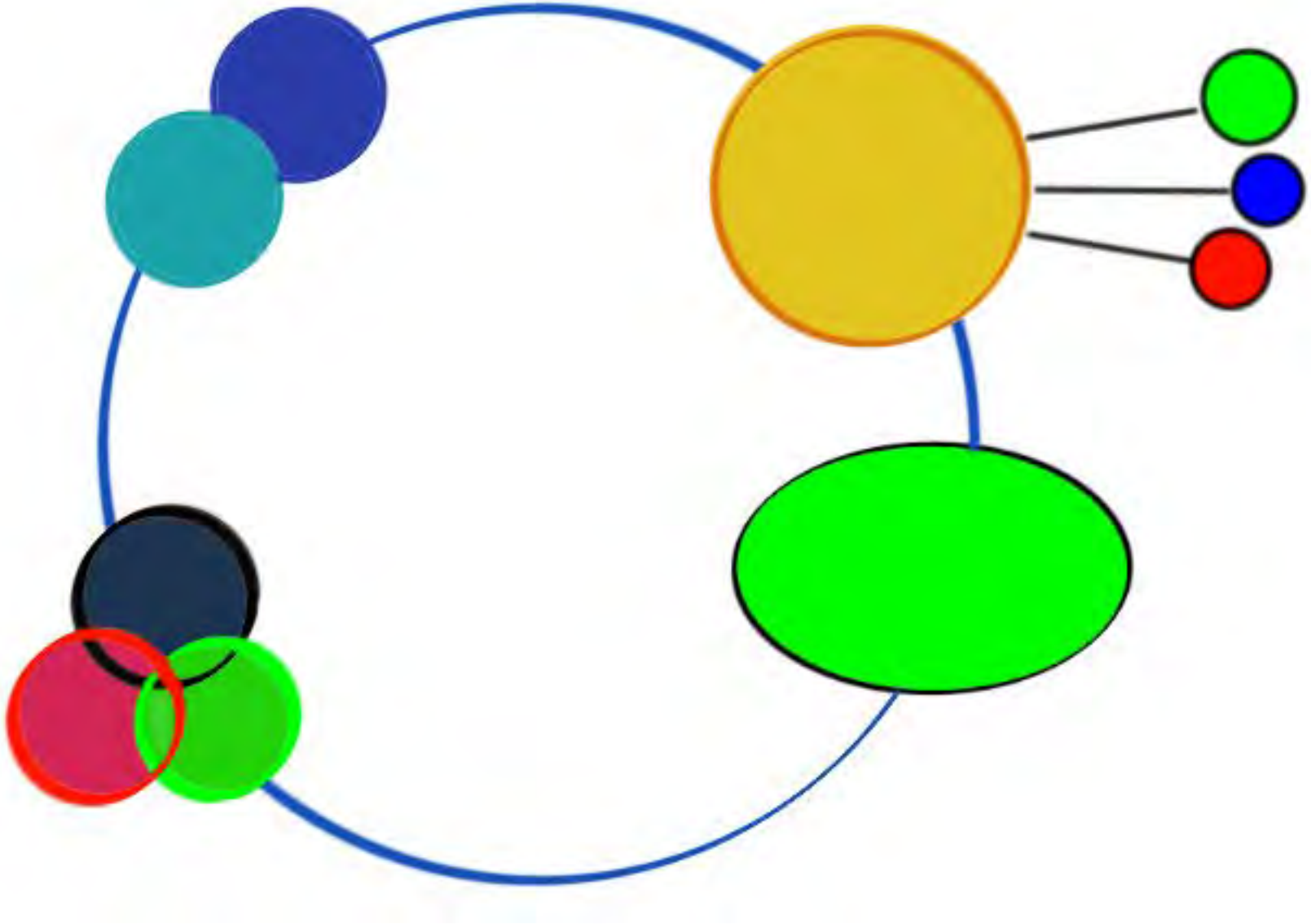
All Microboards start with a circle that is made up of allied family members, friends and community partners.



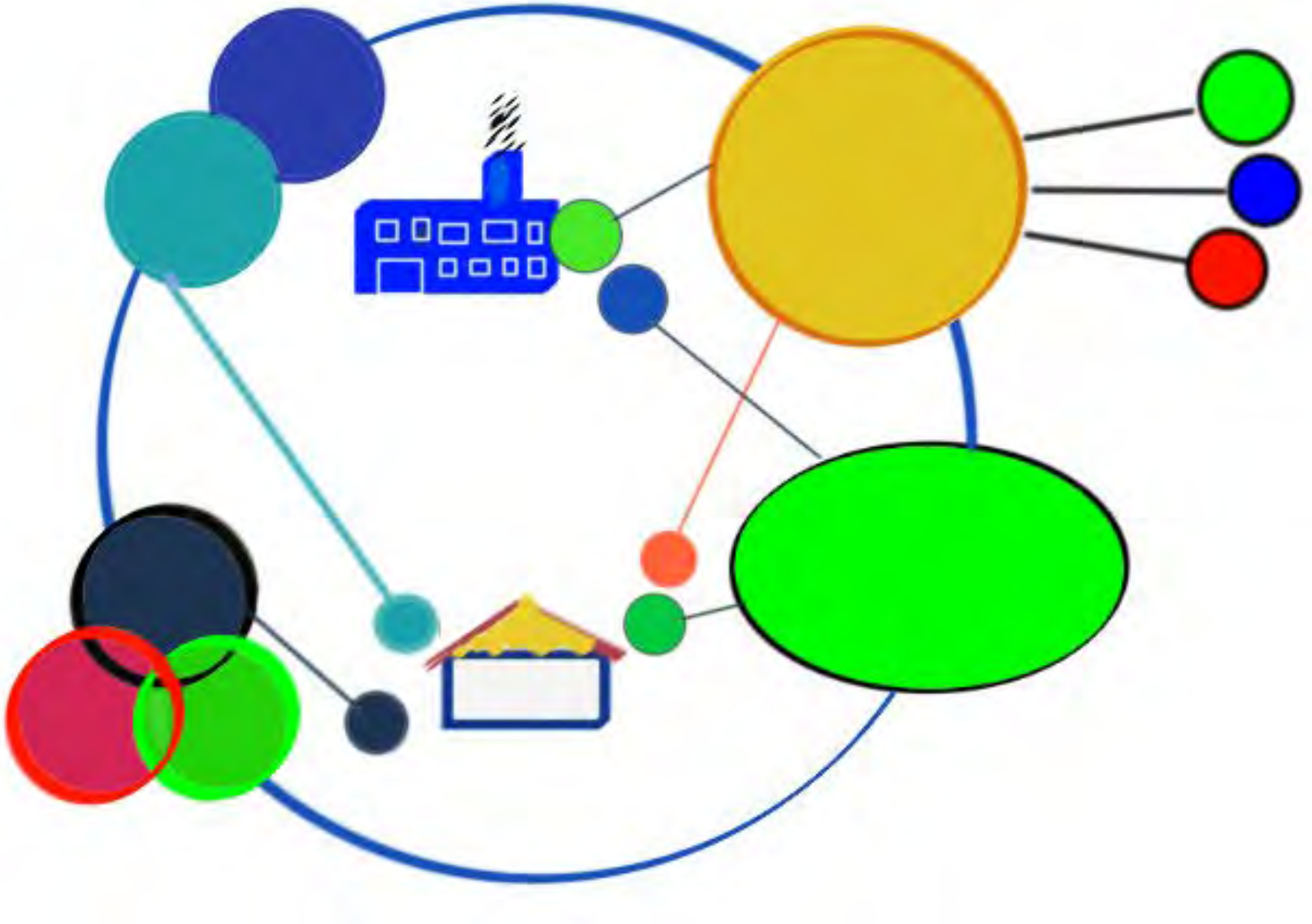
At any given time, a few members of the circle, including the person at the center, serve as directors of the Microboard corporation.



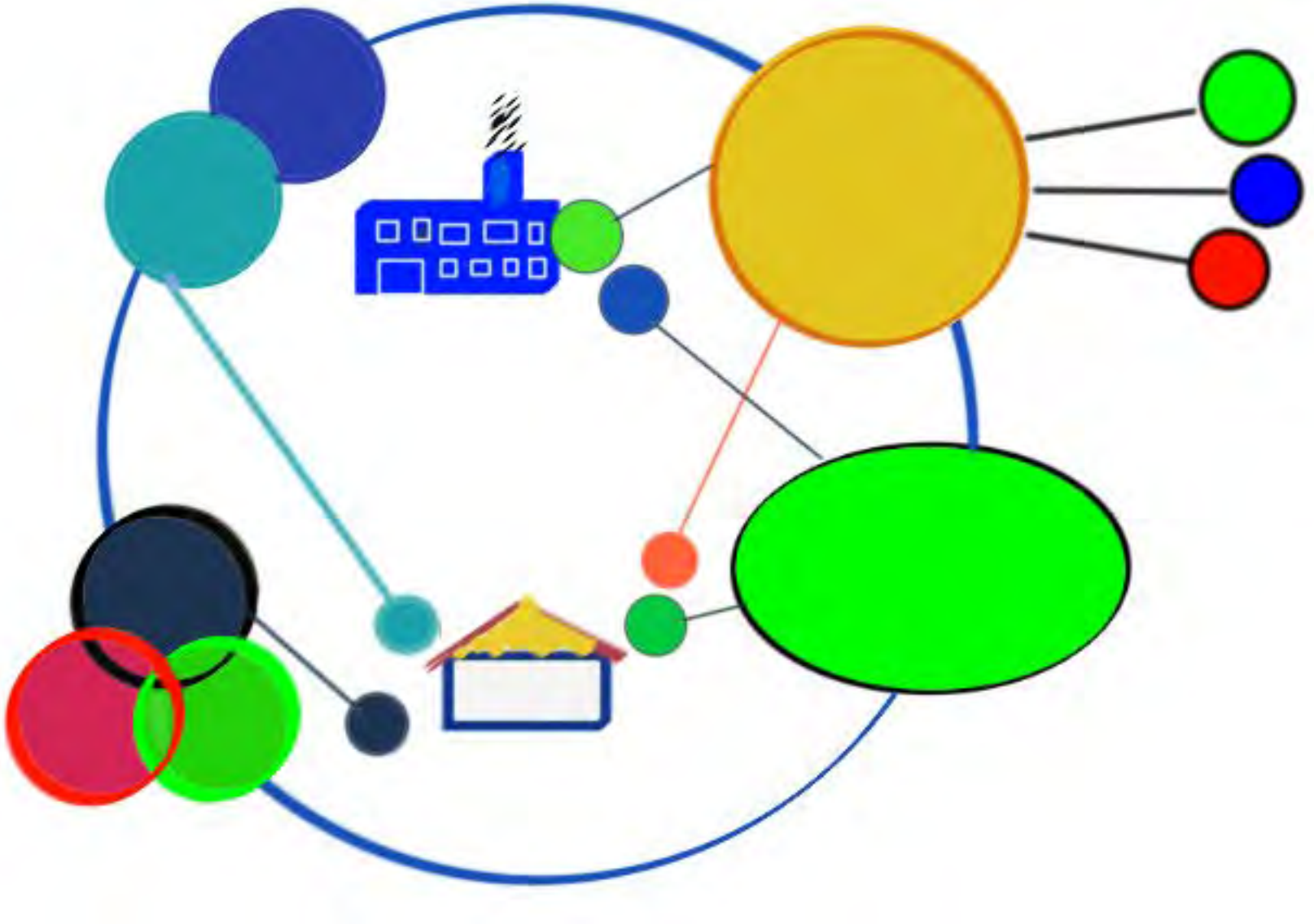
Other circle members may serve in additional roles, as Supported Decision-Making partners, Financial Trustees, formal Representation Agreement partners, and so on.



Circle members can also assist the person in being successful as a renter or owner his or her own home, or in customized employment.



Taken together, all of these elements create a unified, continuing pathway to a good life.



A unified, person-centered, family-friendly, community-based solution

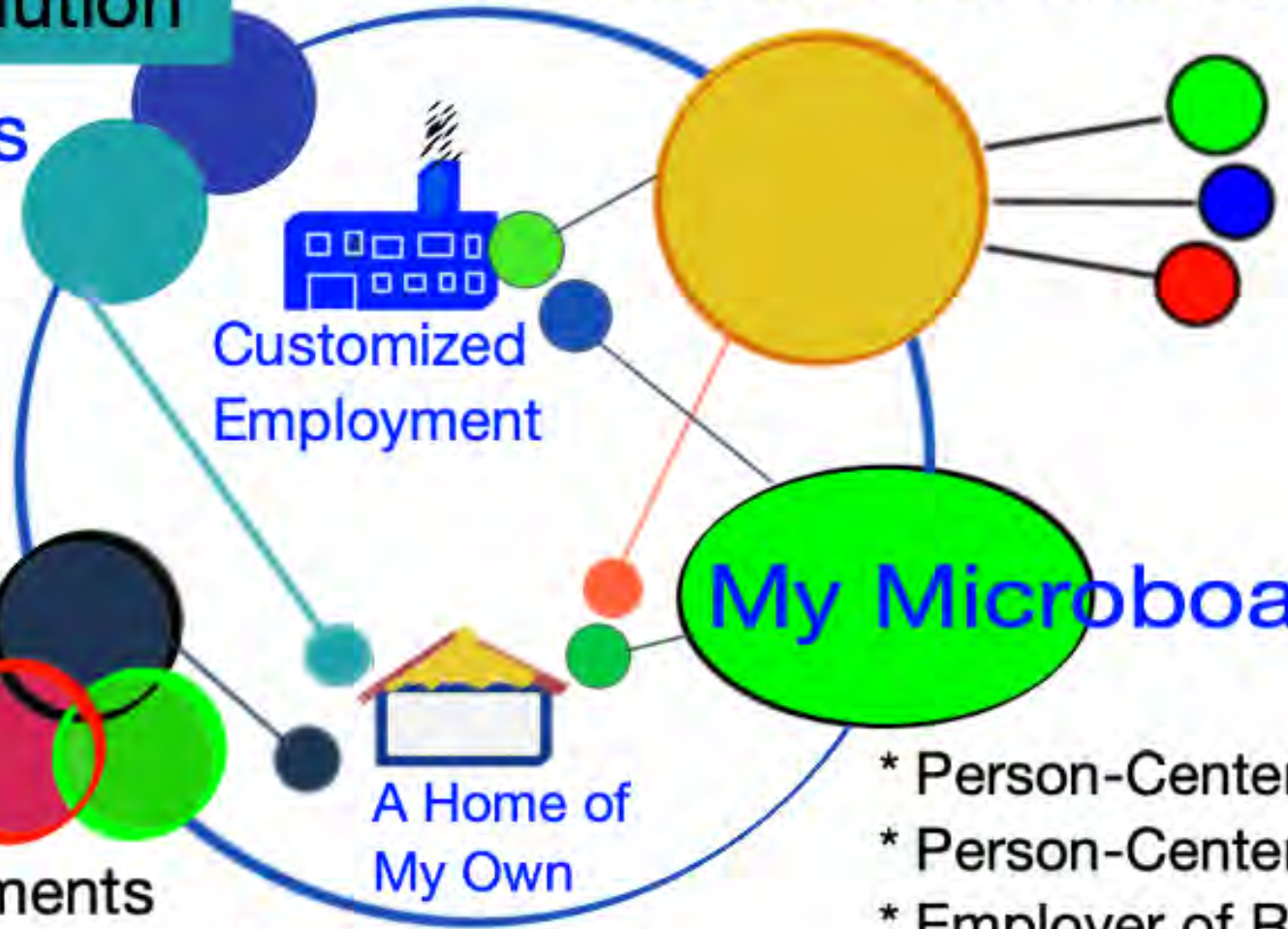
My Financial Trustees

* Wills and estate planning
* Discretionary trusts (special needs trusts)

My Supported Decision-Making Partners

* Representation Agreements
* A legal alternative to guardianship

A circle of allied family members, friends, and community partners



* Person-Centered Planning
* Person-Centered Support
* Employer of Record
* Continuity of Care

Elements of a Good Life

- Autonomy and Interdependence
- A Life that is Rich in Relationships
- Meaningful Employment
- Meaningful Contributions
- Valued Social Roles
- A Home of My Own
- Financial Security
- Continuity of Care and Advocacy
- Person-Centered Supports

Principles and Functions for Microboards

All Microboards that we facilitate use the following Principles and Functions as their building blocks for development:

1. Microboard members must establish and maintain a personal relationship with the person for whom the board is created.
2. All people are assumed to have the capacity for self-determination. This capacity will be acknowledged, respected, and demonstrated in all of the dealings of the Microboard.
3. All planning and decisions made by a Microboard will demonstrate regard for the person's safety, comfort, and dignity, with consistent respect for his/her needs, wishes, interests, and strengths. This is called person-centered planning.
4. Microboard members will act as sponsors to the community, ensuring the person participates in community activities with Microboard members (e.g. family functions, social events). This is done in ways that are natural for each of the people involved.
5. Ensure the person has the opportunity to both receive from and give to his/her community, as well as with other individuals in his/her network.
6. All Microboard members will conduct their board business in the spirit of mutual respect, cooperation, and collaboration.

The 'Arc' of Microboard Development
David Wetherow and the Wisconsin Microboard Association
August 1, 2018

The 'Arc' of Microboard Development

In our experience, all Microboards (in fact all new enterprises of any kind) develop knowledge, skills, excellence in practice, and leadership *over time* in a trajectory that might be pictured as a kind of upward 'arc' of development.

The long-term *goal* of Microboard development, is to:

- Establish a formal, enduring organization in support of one person;
- Keep the person, their community partners and those who care about them the most at the center of decision-making and control by including them as valued members of the board;
- Establish a Board of Directors that reflects the person's interests, gifts, concerns and community as well as those who know them best and love them. This diversity is essential to the long-term purpose of any Microboard. Though this diversity may not fully exist at the time of incorporation, a plan to grow the Board is identified at incorporation.
- Engage a diverse, capable, committed and community-connected group of support staff (assistants) whose attitudes and interests are well-matched to the person at the center;
- Define the roles and job descriptions of staff members in ways that reflect the person's interests, systematically increase the person's connections in the larger community, and create a path for the person to be making valued contributions in the larger community;
- Function in a person-centered manner beyond the lives of the parents and/or guardians.

Georgia Microboard
Board Training Handbook

Putting People, Behind People,

Who Need People.

www.gamicroboards.org

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Illinois Association of Microboards and Cooperatives

"Empowering Quality Lives"

Illinois Association of Microboards and Cooperatives

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JOB OPPORTUNITIES SEVEN CORNERS GALLERY

Recommended General Strategies for States and Providers to Support Person-Centered Solutions

- Approve Microboards as fully-qualified service providers
- Support development of Star Raft circles and similar solutions
- Assist agencies in converting to person-centered enterprises, moving authority, responsibility and resources into the hands of people and families
- Separate the provision of housing from the provision of supported living services
- Separate the provision of places of employment from the provision of employment support services

Build and support 'Infrastructure' for Person-Centered Solutions

Support **Independent, Local s**ources for:

- Person-Centered Planning Training
- Person-Centered Planning Facilitation
- Microboard Development and Support
- Star Raft / Support Circle Training & Facilitation

Develop and support **Independent, Local c**apacity for delivering:

- Representation Agreements as an alternative to guardianship
- Total Discretionary (Special Needs) Trusts
- Home of One's Own Solutions
- Customized Employment

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July 2016
Launching Out Of Faith
Next Steps
BOLD
Positive + Possible
Tim
Friends
Support
TIM
Camp Glisen
possible job/volunteer
Ministry
Lay Ministry
Co-teaching a class on disability + religious community
Public Speaking
Prayer Group
Advocacy +
Community Engagement
Hospitality
Oak Grove
Strong Social Media Presence
Sharing about inclusive community

Real-Time Evaluation Questions

- Please take a moment to respond to these seven evaluation questions to help us deliver high-quality NCAPPS webinars.
- If you have suggestions on how we might improve NCAPPS webinars, or if you have ideas or requests for future webinar topics, please send us a note at NCAPPS@acl.hhs.gov

Questions?

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