

Understanding the Consumer-Directed Option: Is It Right for You?

Goal

- To help participants explore the concepts of choice, preference, rights, and responsibilities in obtaining personal assistance services for themselves.

Time

3 hrs, 45 minutes, plus breaks

Activities	Teaching Methods	Time
2.1 Welcome	Large-Group Exercise	30 minutes
2.2 The Ideal (or Perfect) Personal Assistant	Individual Exercise, Discussion	45 minutes
2.3 Opinion Poll 3	Large-Group Exercise	15 minutes
2.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model	Small-Group Brainstorming, Discussion	60 minutes
2.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities	Discussion	45 minutes
2.6 Closing	Discussion	30 minutes

Supplies

- Nametags and/or card stock table tents
- Three-ring binders to hold participants' handouts (see Build a Resource Guide in the Introduction).
- Flip chart, easel, markers, tape
- Paper and pens or pencils

Note: An LCD projector and computer may be used for some presentations, if desired. If you intend to use a projector, make sure you have the necessary equipment. Some PowerPoint slides are provided on your CD for Workshops 1 and 2. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.

Handouts

- Handout 1: Understanding the Consumer-Directed Option: Goal and Objectives
- Handout 2: My Ideal (or Perfect) Personal Assistant
- Handout 3: Opinion Poll 3
- Handout 4: Consumer-Directed Model: Advantages and Disadvantages
- Handout 5: Agency Model: Advantages and Disadvantages
- Handout 6: Advantages and Disadvantages of Two Personal Assistance Models
- Handout 7: The Agency-with-Choice Option
- Handout 8: Agency and Consumer-Directed Models: Rights and Responsibilities
- Handout 9: MI Choice Waiver, Self-Determination and Agency-with-Choice Models: Rights & Responsibilities
- Handout 10: Medicaid Home Help Program (MQC3) Rights & Responsibilities
- Handout 11: Agency and the Partners in Personal Assistance Models: Rights and Responsibilities

For new participants or those who may not have brought their binders from the previous session, you may also want to have ready:

- Workshop I, Handout 5: Opinion Poll 1, page 2 of 3, "Brainstorming Helps Everyone Be Heard"

Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants' physical needs.

Review the "Trainer's Guide" and handouts for each activity.

Set up flip chart easel and other equipment, as necessary, for optimum viewing by all participants. Put out name tags or table tents at each participant's place.

Copy all handouts you plan to use for all participants.

Post the workshop goal and objectives (see **Handout 1**) on a prepared-in-advance flip chart page.

Activity 2.1 Welcome

Copy and place in participants' binders, **Handout 1: Workshop Goal and Objectives**.

Prepare **flip charts** for each of the steps as follows:

- Introductory activity (step 2)
- Workshop goals and objectives (step 3)
- Day's agenda (step 4)
- Learning agreements. You may have saved this flip chart from Workshop I (step 5)
- Parking lot (step 6)
- Questions, Comments and Expectations

If this is your first session with participants, make a copy of **Workshop I, Handout 2: Workshop Learning Agreements** for participants.

Activity 2.2 The Ideal (or Perfect) Personal Assistant

Prepare a **flip chart** page of “My Best PA Experience,” as shown in step 1.

Prepare a **flip chart** page of a stick figure as shown in step 2.

If you have the “My Ideal (or Perfect) Day” characteristics **flip chart** from a prior session, post it in the room.

Copy **Handout 2: My Ideal (or Perfect) Personal Assistant** for all participants.

Prepare a **flip chart** with the questions shown in step 6.

Activity 2.3 Opinion Poll 3

Prepare a **flip chart** page of Opinion Poll 3 as shown in step 2.

Have three colored **placards** prepared in advance that say “Strongly Agree” (green), “Strongly Disagree” (red), and “Mixed Opinion” (other color) for this exercise. You may have these from the prior workshop.

Copy **Handout 3: Opinion Poll 3** for all participants.

Activity 2.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model

Prepare **flip chart** pages of two grids “Consumer-Directed Model: Advantages and Disadvantages” and “Agency Model: Advantages and Disadvantages” as shown in step 2.

Copy **Handout 4: Consumer-Directed Model: Advantages and Disadvantages** for half the participants and **Handout 5: Agency Model: Advantages and Disadvantages** for the other half.

Prepare two **flip chart** pages, transparencies, or computer file with the summary grids “Advantages and Disadvantages of Two Personal Assistance Models,” as shown in step 4. A sample slide can be found in the PowerPoint folder on the curriculum CD.

Copy **Handout 6: Advantages and Disadvantages of Two Personal Assistance Models** for all participants.

Copy **Handout 7: The Agency-with-Choice Option** for all participants.

Activity 2.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities

Prior to this activity, review **Handouts 8 – 11**, which include a blank rights-and-responsibilities grid, as well as completed grids that describe the specific rights and responsibilities of three Michigan programs. Decide which of the teaching options you will use. You can have participants fill in the blank grid without reference to a particular program; review one of the completed grids; or complete a grid that describes your specific program. Make sure you know the regulations and can fill in this grid accurately.

Copy the **handout(s)** you plan to use for all participants. If you plan to use overhead projection, prepare transparencies or computer files of the handout(s) you choose:

- **Handout 8: Agency Model and Consumer-Directed Model: Some Key Differences**
- **Handout 9: MI Choice Waiver, Self-Determination and Agency-with-Choice Models: Rights & Responsibilities”**
- **Handout 10: Medicaid Home Help Program (MQC3) Rights & Responsibilities**
- **Handout 11: Agency and the Partners in Personal Assistance Models: Rights and Responsibilities**

Activity 2.6 Closing

Prepare a **flip chart** to record evaluation scores as shown in step 3.

Activity 2.1 Welcome

30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe the goal and objectives of the workshop; and

Identify each other by name.

Key Content

- **Workshop goal:** After completing this workshop, participants will have the information they need to make an informed choice about the consumer-directed option.
- **Objectives:** Participants who complete this workshop will be able to:
 - Describe the consumer-directed service model and the rights and responsibilities that go with consumer-directed services;
 - Identify their personal assistance needs and preferences; and
 - Determine if the consumer-directed option is the best option for them.
- This workshop is intended as an orientation for consumers who are considering the consumer-directed option and need to learn more in order to decide whether to proceed in this direction. Two additional workshops—one with three modules on finding, screening and hiring, and a second with two modules on supervision—provide more in-depth information and skill-building exercises for consumers who are ready to recruit and hire PAs or who are already supervising PAs.

Activity Steps

Warm-Up Exercise and Discussion—30 minutes

1. **Welcome participants** to the workshop (or back to the workshop series if this is their second session) and introduce yourself. Ensure that everyone is comfortable with the room's layout and temperature and that everyone has filled out table tents.

2. **Conduct a warm-up exercise:** If this is the first session for some or all of the participants, see Workshop I: Activity 1.1 for the introductory exercise.

If this is the second session, you can select an activity from the "Introductory, Warm Up & Energizer Activities" guide found on your curriculum CD or use the following activity.

Have each person introduce him or herself, explain if he or she would like any individual assistance or accommodation, and answer question 3. If there's time, ask them to answer question 4. Ask each person to take no more than a minute and keep introductions to 10 minutes:

INTRODUCTIONS & WARM-UP

1. What is your name (and your PA's if they're here)?
2. What can we do to help you have the best learning experience possible?
3. What do you like most or least about Michigan?
4. What are your favorite things to do?



❖ Teaching Tip

It may help to give your own answers to the questions to demonstrate what you are looking for. Always check if people understand instructions after giving them and before moving into the activity. Encourage clarifying questions.

Sample accommodations people may need include:

- Having you speak more loudly or with a microphone
- Larger writing on the flip charts
- Reading all words written on the flip charts
- Assistance with reading and/or writing on their worksheets

3. **Review goal and objectives:** Referring to the prepared-in-advance flip chart, review the goal and objectives for the workshop. Explain that today's session will focus on exploring the consumer-directed option so that participants can make an informed decision about which option will work best for them. Distribute **Handout 1: Understanding the Consumer-Directed Option: Goal and Objectives.**

UNDERSTANDING THE CONSUMER-DIRECTED OPTION

Goal

After completing this workshop, participants will have the information they need to make an informed choice about the consumer-directed option.

Objectives

Participants who complete this workshop will be able to:

- Describe the consumer-directed service model and the rights and responsibilities that go with consumer-directed services.
- Identify their personal assistance needs and preferences.
- Determine if the consumer-directed option is the best option for them.



4. **Review the day's agenda:** Using a prepared-in-advance flip chart with the agenda and times as *you* have scheduled the session, note the highlights, including break times.

TODAY'S AGENDA (SAMPLE)

2.1 Welcome	11:00 am
2.2 The Ideal Personal Assistant	11:30
2.3 Opinion Poll 3	12:15 pm
Break	12:30
2.4 Advantages and Disadvantages of the Consumer-Directed vs. Agency Model	12:45
2.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities	1:45
2.6 Closing	2:30
Adjourn	3:00



5. **Review workshop learning agreements:** If this is your first session, pass out **Workshop I, Handout 2: Workshop Learning Agreements**, and present the agreements listed on the prepared-in-advance flip chart.

If this is the second session, review the prepared-in-advance flip chart saved from the first session.

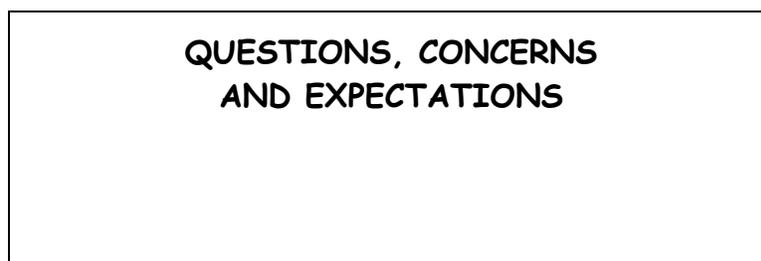
Emphasize that you want to hold the workshop in a way that illustrates the same values of respect and community that drive the movement for consumer direction. You may recall for participants what they said worked or could be improved upon from the last session’s evaluation and explain how you intend to use their feedback to make this session as effective as possible.

Also, remind participants of any needs participants have asked others to accommodate and thank everyone for helping to ensure that their needs are taken care of.

6. **Explain parking lot:** Display a flip chart labeled “Parking Lot” and explain that this will be the place to record issues that come up that are important, but can’t be addressed at the time they arise because of the schedule and your efforts to cover all the topics in the session.



7. **Check for participants’ concerns and questions:** Ask if anyone has any comments and concerns regarding the last session or regarding today’s goals and agenda. Ask if anyone has expectations other than what you’ve presented. Write these on the flip chart to ensure they are attended to as necessary.



8. **Explain participatory nature of workshop:** Note that the style of this workshop is very participatory and interactive. Everyone will have opportunities to share their thoughts, feelings, and experiences, but participants will not be forced to speak. Strongly encourage people to ask questions if they don't understand points being made or are unclear about instructions that you've given.
9. **Thank everyone** for contributing and say, "We'll now start with our first exercise."

Activity 2.2 The Ideal (or Perfect) Personal Assistant 45 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe their ideal personal assistant (PA)—i.e., the traits or qualities of a PA, including abilities, personality style, and interests that participants consider most important; and

Explain how having an ideal in mind can be helpful in making conscious choices or trade-offs when screening and hiring PA candidates.

Key Content

- Articulating the ideal traits and qualities of a personal assistant will help the consumer find personal assistance staff who make a good fit in terms of skills and personality.
- Employer-employee matches are rarely perfect. A goal in recruiting and hiring is to make conscious choices about the PAs being selected—their skills, personality, and interests, and the type of supportive supervision that will ensure that the PA is a successful hire in the long run. Ultimately, the consumer must decide how closely the candidate matches his or her ideal PA and consider what trade-offs will be made in hiring.

Activity Steps

Individual Exercise—10–15 minutes

1. **Introduce the exercise:** Display the prepared-in-advance flip chart, “My Best PA Experience” and ask participants if they can recall their best personal assistant experience. After a moment, ask if anyone can say what made that relationship or experience stand out as the best. Take one or two answers and explain that you want participants to keep these qualities in mind as they work on the next activity.

MY BEST PA EXPERIENCE

- ★ What was your best PA experience?
- ★ Who was the person?
- ★ How did this person come into your life?
- ★ What makes that relationship stand out as the best?



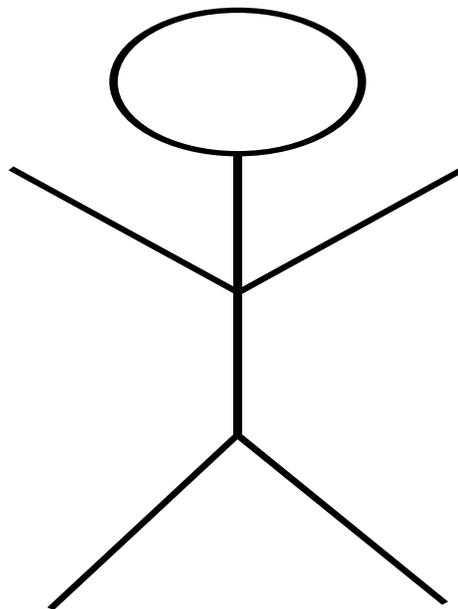
❖ Teaching Tip

Depending on what works for your participants, you can refer to the “ideal” or the “perfect” assistant.

2. Give participants time to consider their own ideal or perfect PA:

Display the prepared flip chart below and distribute **Handout 2: My Ideal (or Perfect) Personal Assistant**, which has the same image. Give participants 5–10 minutes to brainstorm the qualities of their ideal PA and to write their ideas on their handouts if they would like. Invite them to consult with other participants they are sitting next to.

MY IDEAL (OR PERFECT) PERSONAL ASSISTANT



❖ **Teaching Tip**

If participants have not had good experiences with PAs, ask them to think of their “dream” PA and imagine what the PA’s qualities would be like. If this still seems difficult, as you circulate and check in with participants, listen to their stories and suggest the positive that is the opposite of what they’re describing. For instance, if a participant says, “He didn’t even try to do a good job!” you might say, “So you’d like someone who was really conscientious?” You may also identify what was lacking in the PAs he or she has worked with, and add those qualities to the stick figure as desirable traits.

Discussion—30 minutes

- 3. Ask participants to share their responses:** Explain that as participants talk about their best PA experiences, you will identify an associated body part and label the figure to represent the skills and qualities of an ideal PA. Invite participants to add to their own list those qualities they would like that others have thought of.

Ask for a volunteer to start the discussion by answering the four questions on the flip chart introduced in step 1. Give everyone a chance to share their answers, particularly those qualities which have not already been mentioned.

❖ **Teaching Tips**

If there is not time for each person to answer the four questions, you can just ask for the characteristics of the ideal PA.

You may want to ask each participant to give you just one characteristic at a time, so that everyone can answer as you circle around to all participants.

If participants offer negative qualities they don’t want, such as “not lazy!” suggest the positive contrasting word, such as, “So you’d like someone who is hard working?” If the participant agrees that this is a quality she or he would like, write it on the flip chart.

Depending on the number of people in your workshop, and their comfort level and ability to participate in the large-group discussion, you may have people break into small groups for discussion to prepare for the large-group debrief. You will need to allow an extra 10–15 minutes if you take this approach.

- 4. Check for qualities that would help participants have ideal days.** If this is the second workshop in the series, refer to the flip chart that has the characteristics of ideal days (Activity 1.3, Step 8). Ask participants:

To help make your perfect day happen, what qualities would your ideal or perfect PA need?

Are all of these qualities represented on the stick figure?

Add additional qualities, if appropriate.

❖ **Teaching Option**

You may want to distribute copies of “The Perfect Personal Assistant,” which is in the Module 2 folder on the CD and website. If you choose to distribute this handout, ask participants if they see any additional qualities or skills that they would like to add to the list you’ve been building. You may also ask if there are any skills or qualities they see that surprise them.

5. **Highlight uniqueness of each person’s ideal and the qualities many, if not all, consumers have in common:** Explain that just as everyone’s ideal day is different, so is their ideal PA. This is great, because it means that different types of people will be available for different types of consumers! Ask for some of the very unique qualities on the list that were mentioned by only one person.

Next, ask for the qualities that were shared by many, if not all, participants and discuss why they are important.

6. **Invite participants to identify “must haves” and qualities they could “let go”:** Explain that, while it’s important to know what kind of person one is looking for, in order to evaluate candidates and make trade-offs, each participant must also identify the skills and qualities that are *most* important to them—and the skills and qualities that they are willing to let go of—if no potential candidate fits their “ideal.” As time allows, use a prepared-in-advance flip chart to ask the questions:

MUST HAVES AND TRADE-OFFS

- ★ Which qualities are your five “must haves”?
Asterisk (*) or star (★) these.
- ★ If you have to trade-off 3 of the qualities of an ideal personal assistant, which would you choose?
- ★ Check (✓) or put a cross (x) next to these.



Why are these your "must haves" and trade-offs?

Invite discussion and draw out how different each person's "must haves" and trade-offs might be and how important it is that each person knows what his or hers are. If time does not allow, encourage people to do this exercise outside of class.

7. **Thank everyone** for their contributions and their honesty, and emphasize how much everyone (including you) learns by participants sharing their stories and needs.

Activity 2.3 Opinion Poll 3

15 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Identify and express their feelings and opinions about agency-coordinated services; and

Feel comfortable having and expressing opinions that are different from others in the group, and be interested in learning from the different experiences and opinions of others.

Key Content

- This opinion poll (like the others in the series) is intended to generate initial reactions to issues people may feel very strongly about. The goal of all of the opinion polls is to encourage people to speak openly and to be comfortable and accepting when listening to the opinions of others.
- This poll addresses the role of agency-provided services in participants' lives. For many, this is likely to be an emotionally charged issue. Some may have decided to participate in this workshop specifically because of negative experiences with agency services. Some may feel angry about the control agencies have over their lives.
- This statement was chosen specifically to allow participants to express those feelings early on in the workshop. It is hoped that, having expressed and found acceptance for those feelings, they can be more open-minded as they explore whether or not directing their own services is a good option for them.

Activity Steps

Large-Group Exercise—15 minutes

- 1. Give directions for the exercise:** If this is the second workshop, ask participants to pull out any opinion placards they held onto from the first workshop. If it is the first workshop, give each participant three differently colored placards—one says, "Strongly Agree" (green), the second says, "Strongly Disagree" (red), and the third says, "Mixed Opinion" (other color).

This exercise is intended to make you think about how personal assistance services are provided and how you as individuals feel about that.

I will read a statement. Please think about whether you strongly agree with that statement, strongly disagree, or have a mixed opinion. There is no right or wrong answer, and you are entitled to your own opinion. The purpose of the exercise is to consider how you feel and to hear what others feel.

After you hear the statement, please raise the placard that that matches your opinion and, then, we'll hear from people in each group about why they feel that way.

❖ **Teaching Tip**

If space allows participants to move to three corners of the room, and they are physically able, you can have participants move to one of three parts of the room to express their opinions. Post one of the colored placards on each wall to indicate where you want participants to go.

2. **Read the opinion poll:** Display the prepared flip chart and distribute **Handout 3: Opinion Poll 3** and read aloud:

People with disabilities who need attendant services are better off using personal assistants who are hired, trained, scheduled, and supervised by home care agencies.



❖ **Teaching Tip**

The opinion polls are intended to elicit participants' feelings and experiences and to stimulate initial discussions about the topics. The polls also serve as icebreakers for group interaction. Be sure to validate each person's opinion in a way that allows others to have different feelings and beliefs.

The statement may be a little complicated for some participants. Feel free to simplify the statement. If necessary, read the statement two or three times.

3. **Remind participants how to express their opinion:** Ask participants to raise the placard or go the location that best represents how they feel about the statement.

4. **Facilitate a quick dialogue** by asking the following questions:

Why did you place yourself where you did? What experiences influenced your opinion?

What does "mixed" mean to those who made this choice?

5. **Explain that the next exercise will continue the discussion:** The next activity will provide an opportunity to explore more fully the pros and cons of agency and self-directed approaches. Explain that the discussion will be continued in that activity.
6. **Thank everyone** for being candid about their opinions and respectful toward others. Explain that being able to have dialogue across differences of opinion is important to building strong relationships and communities.

Activity 2.4 Advantages and Disadvantages of Consumer-Directed vs. Agency Model

60 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe the differences between the consumer-directed and agency-coordinated models and their advantages and disadvantages; and

Describe how directing their personal assistance services may or may not better serve their life needs.

Key Content

- In this workshop, “choice” refers to consumers selecting the model of personal assistance services that allows them to live their lives (immediate and future) in ways that best match their assistance needs and personal preferences. The two most common models to choose from are consumer-directed (CD) services and agency-coordinated services. Michigan consumers may also opt to use a combination of the two service models, which is called “Agency with Choice.”
- Each option has advantages and disadvantages. Understanding how each model functions and how it suits the needs and preferences of different consumers is essential to selecting the most suitable model.

Activity Steps

(See Teaching Option following step 7 for an alternative method for Steps 1 – 7.)

Small-Group Brainstorming—20 minutes

1. **Divide participants into two groups:** Assign “Consumer-Directed Model” to one group and “Agency Model” to the other.

2. **Give handouts and instructions to each group:** Give all participants in each group a corresponding handout, either **Handout 4: Consumer Directed Model** or **Handout 5: Agency Model**. Ask each group to brainstorm both the advantages and disadvantages of their assigned service model. Remind them that in brainstorming, every idea is accepted—there are no wrong answers or bad ideas. Ask them to identify one person to write down their brainstormed ideas and one to report out for the group. Explain that they will have 10 minutes.

❖ **Teaching Tips**

You may want to share or review the purpose and rules of brainstorming covered in the first session. See **Workshop I: Handout 5 – “Opinion Poll 1,” page 2 of 3, “Brainstorming Helps Everyone Be Heard.”**

You may also break into four groups and have each brainstorm only disadvantages or advantages of their model (consumer-directed or agency).

Encourage group members to help one another record and report, but if necessary, the same person can write and report.

Individuals bring different backgrounds, skills, and experiences to these discussions. Exploring participants’ varying perspectives allows everyone to consider advantages and disadvantages of each model that they may not have considered before.

Participants tend to have very strong feelings (generally negative) about the agency model—probably because it is what they know best and it likely did not fully serve their needs. This may be a factor in their considering or already using the consumer-directed model. Like the previous activity, this exercise aims to draw out such feelings so participants can more objectively explore both models.

Circulate and monitor the small-group discussions to be sure the pros and cons of each model are being discussed and explored.

Discussion—40 minutes

3. **Invite groups to report:** Have each small group share its responses about the advantages and disadvantages of the two models with the whole class.
4. **Record the groups’ responses:** On prepared-in-advance flip charts or overhead/slide, write each group’s responses.

Consumer-Directed Model	
Advantages	Disadvantages



Agency Model	
Advantages	Disadvantages



5. **Invite additions to the lists:** After each report, ask if anyone in either group wants to add items to the list. If there are gaps in the list, add your own suggestions (see **Handout 6: Advantages and Disadvantages of Two Personal Assistance Models** and lists generated from class notes).
6. **Review Handout 6:** Thank both groups for their work, and distribute **Handout 6: Advantages and Disadvantages of Two Personal Assistance Models**. Ask if anyone sees a point on these lists that they hadn't thought of.
7. **Wrap up the discussion:** Ask participants to summarize what they learned from this activity. Ask:

What do you see as the greatest strengths and greatest challenges associated with each model?

Were there any surprises or things you had not thought about before?

*How does this affect the opinion you expressed in our Opinion Poll exercise?
Has it changed your opinion or affected how you feel about others who have different opinions from you?*

- ❖ **Teaching Option: Large-Group Brainstorming as Alternative to Steps 1 - 7**
Small-group brainstorming followed by large-group discussion is recommended for this activity in order to encourage active input from many participants and to

help everyone think about aspects of each model that they may not have previously considered. However, small groups take time to set up and report back. If time is short, participants’ physical or cognitive functioning is limited, or if the groups seem unlikely to complete the small-group brainstorming in 15 minutes, use large-group brainstorming, as follows:

1. Facilitate a brief discussion about participants’ knowledge of and thoughts about the consumer-directed and agency models. Draw out participants’ feelings, experiences, and reactions to both, building on discussion in the last opinion poll exercise.
2. Using prepared flip chart pages or overheads/slides, display the blank “Advantages and Disadvantages of Two Personal Assistance Models” summary grid:

Consumer-Directed Model	
Advantages	Disadvantages



Agency Model	
Advantages	Disadvantages



3. Go around the room and ask participants to fill in the grids starting with the advantages and disadvantages of the consumer-directed model by having each person contribute one point. Continue seeking input until the group has exhausted its knowledge of each model. Add your own comments, if necessary (see **Handout 6: Advantages & Disadvantages of Two Personal Assistance Models**).
4. Ask participants to summarize what they learned from this activity. Ask:

What do you see as the greatest strengths and greatest challenges associated with each model?

Were there any surprises or things you had not thought about before?

5. Distribute **Handout 6: Advantages and Disadvantages of Two Personal Assistance Models** for participant binders.

8. **Discuss agency-with-choice option:** Pass out **Handout 7: The Agency-with-Choice Option**, which describes a hybrid model available to Michigan consumers. Explain that in this model consumers can choose PAs, supervise them, and fire them, but agencies handle financial employment relations such as wages, benefits, and tax-withholding.

9. **Thank participants** for sharing their points of view and for being patient and open to others' ways of thinking.

Activity 2.5 Consumer-Directed vs. Agency Model: Rights and Responsibilities

45 minutes

Learning Outcome

By the end of this activity, participants will be able to:

Explain their rights and responsibilities when choosing the consumer-directed (CD), agency, or agency-with-choice option.

Key Content

- Consumers have distinct rights and specific responsibilities that they must fulfill when employing a personal assistant. Knowing those rights and responsibilities and understanding how they can fulfill their responsibilities as employers are important elements in making an informed choice about which option to pursue.

Activity Steps

(See Teaching Option following step 1 for an alternative method.)

Discussion—45 minutes

1. **Distribute and review Handout 8: Agency Model and Consumer-Directed Model: Rights and Responsibilities.** Ask participants to think about each routine function or area of concern and who has responsibility for it in each of the two models.

❖ Teaching Option: Presentation and discussion

You can choose to handle this activity in one of two ways:

- ♦ Using **Handout 8: Agency Model and Consumer-Directed Model: Rights and Responsibilities**, you can go through the form line by line, asking participants to think about who is responsible for the particular function—the consumer or the agency. (If you have a projector, display **Handout 8** and write in the correct response as you go.) This will give participants time to thoughtfully consider what is involved for them in the consumer-directed model.

You can follow this activity with a quick overview of the **Handouts 9 – 11** (*see below*) to illustrate the various approaches that different programs in Michigan make available to consumers, if you think this will be useful to your participants. The risk is that it will be confusing and distressing to participants if their preferred model is not available to them.

OR:

- ◆ You can fill in Handout 8 so that it describes the responsibilities in your program or use one of the completed grids in Handouts 9-11. Using the completed grid, you can review the specific arrangements of your program. The completed grids are as follows:

- ◆ **Handout 9: MI Choice Waiver, Self-Determination and Agency-with-Choice Models: Rights & Responsibilities**
- ◆ **Handout 10: Medicaid Home Help Program (MQC3) Rights & Responsibilities**
- ◆ **Handout 11: Agency and the Partners in Personal Assistance Models: Rights and Responsibilities**

Highlight key points on each line, give examples from your own experience, and explore how the consumer takes on new responsibilities and rights. Note the relationship between the advantages and disadvantages (from Activity 2.4) and the consumer's rights and responsibilities. Point out that many of the listed advantages and disadvantages identified in Activity 2.4 can be categorized as a responsibility of one party in each model. For example, one advantage of an agency is that it is responsible for finding back-up or emergency aides, whereas in a consumer-directed model, that responsibility can fall on the consumer. That's why the "mixed" models can be very effective for consumers. Then, proceed with questions.

2. **Invite discussion about which model is "best."** After reviewing the form with the group, ask:

What surprised you about the breakdown of responsibilities between consumers and agencies?

Which model is best? Refer back to discussion of advantages and disadvantages of each model.

❖ **Teaching Tip**

The desired response to which model is best is “the model most suited to meet various individual needs and preferences—physical, social, emotional, environmental, medical, etc.—of the particular consumer.”

The best model could be either or both, or one of the “mixed” models. Ask leading questions to guide the group to that conclusion, if necessary.

Allowing time for discussion and for participants to express their feelings and concerns, ask:

How does this exercise affect your thinking about choosing the self-directed model?

3. **Wrap up the exercise:** To summarize, ask participants if there were any surprises or if they learned anything new from this comparison.
4. **Thank participants** for sharing their honest opinions and preconceptions.

Activity 2.6 Closing

30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Identify their comfort level in directing their own PA services; and

Know the next steps relevant to this training.

Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group.
- The end-of-day wrap-up also allows participants to share what they learned and reflect on how the workshop has affected their lives. Finally, it gives participants the chance to do an informal evaluation for the instructor about which parts of the workshop were most useful and which could be improved.

Activity Steps

Discussion—30 minutes

1. **Review the session, introduce closing, and check on day's learning:** Explain that this is the end of today's workshop, "Understanding the Consumer-Directed Option: Is It Right for You?" Invite participants to reflect on what they learned and how they can use what they've learned in personal situations. Ask:

What are the one or two most important things you learned about choosing among the consumer-directed, agency, and agency-with-choice options?

How will you apply what you learned to your own choice?

You may want to record responses on a flip chart.

- 2. Ask for personal feelings:** Ask if anyone would like to share how he or she is feeling about choosing consumer direction, or self-determination as the Michigan Department of Community Health (DCH) refers to it, or another option after this introduction.
- 3. Conduct an evaluation:** Ask participants, "How much of today was a good use of your time?" Invite them to vote for one of the percentages you have listed on a prepared flip chart as shown below.

After they've voted and you've recorded the responses (praising those who gave lower rankings for their honesty), ask them to tell you what worked really well for them—the highlights—and what they think could be better—the "low-lights." Record ALL answers on the flip chart. Ask clarifying questions to be sure you understand the points being made.

SESSION EVALUATION	
___ 25% ■ ___ 50% ■ ___ 75% ■ ___ 90%	
<u>Highlights</u>	<u>Things to Improve</u>



- 4. Thank participants who gave specific feedback, both positive and critical,** and emphasize that it will help you improve future sessions.
- 5. Thank everyone for his or her feedback and participation:** Explain your future plans. If you are offering the whole series, explain that the next workshops in the series will focus on recruiting and hiring PAs and supervision skills. Remind those who plan to take the next workshop to bring their binders and materials to the session. If participants have not signed up for the entire

series, explain that everyone is invited to participate. (Give dates of the workshops and explain the enrollment procedure, if already established.)

6. **Adjourn:** A fun way to draw the session to a close is to call for a motion to adjourn and invite all who agree to say, "Aye!!"
7. **Celebrate**, as appropriate.