

**Proposal Summary**  
**Meeting Date: 6/9/2015**

**Clearbrook**  
**Request # 114910**

<b>Project Title:</b>	Discovering CHOICE program
<b>Duration:</b>	24 months
<b>Request Date:</b>	5/4/2015
<b>Request Amount:</b>	\$667,650
<b>Recommended Amount:</b>	\$667,650
<b>Program Area:</b>	Human Services
<b>Population Served:</b>	Developmentally Disabled
<b>Type of Support:</b>	Program Support
<b>Grantee Location:</b>	Arlington Heights, IL
<b>Primary Contact:</b>	Ms. Sheila Lullo

**Project Abstract**

The proposal is to replicate the CHOICE Program, piloted with support from a prior CFI grant, and to develop the Discovering CHOICE manual to assist organizations in: downsizing from large congregate day settings; achieving person vs. program-based programming; and offering flexible services targeting wellness, socialization, volunteerism, and integrated community employment.

**Organizational Background**

**Annual Revenue Sources (Clearbrook)**

Grants	0%	Government	75%	Earned Income	2%
Fees	12%	Private Support	9%	Other	1%

**Finances (Clearbrook)**

	<b>Budget</b>	<b>Actual</b>	<b>Actual</b>
	6/30/2015	6/30/2014	6/30/2013
<b>Revenues</b>	\$38,223,728	\$38,194,651	\$36,257,398
<b>Expenses</b>	38,221,560	37,632,979	36,076,175
<b>Surplus (Deficit)</b>	2,168	561,672	181,223
<b>Net Assets</b>		\$16,083,443	\$15,516,945

2015 marks Clearbrook's 60th year as a provider of services and supports to children with developmental delays and their families and adults with intellectual/developmental disabilities. The organization's mission is a commitment to being a leader in creating innovative opportunities, services and supports for people with disabilities. Clearbrook serves more than 7,000 families and individuals annually. Clearbrook would coordinate this collaborative project which involves two additional agencies.

Since 1955, Park Lawn Association, Inc. (Park Lawn) has served and supported many individuals who are significantly health impaired and medically fragile. Located in Oak Lawn, the organization's mission is to provide services that promote independence, choice and access to community living for people with intellectual and developmental disabilities. The organization serves more than 650 adults from Chicago and the southwest suburbs.

Founded in 1976, UCP Seguin of Greater Chicago (UCP Seguin) serves and supports more than 1,000 children and adults with disabilities within Chicagoland communities so that they may live, learn, work, and socialize as we all do. Located in Cicero, the organization leverages technology to provide innovative training and education programs and an array of residential services and supports (including weekend respite and palliative dementia care), community employment, life skills training and senior day services.

### **Program Description**

The provision of day services for adults with I/DD is at a crossroads. From one direction, the families of children with I/DD aging out of special education make it very clear that the traditional, large, center-based, Monday – Friday day program is not what they/their family member desires. From the other direction, it is evident that there is a national movement away from workshops and large congregate settings. At the intersection of these shifts is the emphasis on person-centered planning. This shift has occurred as passionate concern to support people with developmental disabilities to discover and contribute their gifts brought people together to form communities of practice.

The past five years have brought about significant changes for people with disabilities in Illinois. The settlement of three class action lawsuits challenging the institutionalization of people with disabilities, the state's voluntary closure of several state-operated facilities, and the investment in new models of community-based services have resulted in an increasing number of people with disabilities living in the community. The momentum created by these actions has caused people with disabilities, as well as their families and loved ones, to rethink expectations for their lives and what they need from the disability service system to meet those expectations

In 2013 Illinois joined forces with the national movement toward expansion of jobs for people with developmental disabilities through passage of the "Employment First" Act. The Act articulates the State's policy of "competitive and integrated employment as the first option when serving persons with disabilities of working age, regardless of disability." While funding is under extreme duress in Illinois due to continuing State fiscal woes, the Department of Human Services and its Division of Rehabilitation Services division are mandated to establish means of executing the law and its intent. This Act is also in part a response to the changing federal Medicaid waiver regulations, which govern how Illinois must use the Medicaid matching funds that assist the State in underwriting costs for community service providers. These regulations put at clear risk the funding mechanisms which support sheltered workshops and similar large-scale, segregated service systems.

In 2014 as a response to these trends Clearbrook developed the concept of the CHOICE Program. Developed around the interests and experiences of participants and partnering with the natural supports of the community, the CHOICE program model provides flexibility, options and opportunities for each participant. Initially, program enrollees take a survey (called the "personal exploration process" or "PEP") which enables program leaders to "discover" their interests. Program activities are designed around these needs and offered most usually in the community with programs launching from storefront

or small office sites rather than large industrial centers. Participants number between 25 to 40 individuals as opposed to nearly 150 in large congregate programs and generally engage in activities in even smaller groups. Activities and schedules are flexible rather than being fixed in order to accommodate large numbers of participants. The result is a more personalized experience for participants which has led to greater satisfaction on the part of them and their families. In the refinement of CHOICE from concept to reality, Clearbrook conducted four focus groups with parents of students in transition (a few months to a few years from exiting the school system). The responses were extremely positive with the program's person-centered, choice-driven foundation resonating with the parents. It was their sense from the beginning that the program "feels different."

As shadow partners during Clearbrook's "start-up" year, Park Lawn and UCP Seguin conducted surveys which revealed that more than half the respondents in each organization desired a change in their current day services, to include increased opportunities for employment, volunteerism, smaller settings and a more robust schedule for which they would have direct input in planning. Discussions also reflected on the input provided by some of the more than 1,700 families that have participated in the Building Bridges to the Future project (another Intersect for Ability offering) as they looked to the time their family members would transition from special education to adult services.

The proposed program is a two-year grant that will support the replication, evaluation and dissemination of the CHOICE Program model that was the result of the 2013 pilot grant. The proposed two-year grant has three objectives to be accomplished over two years:

***Year One***

- The start-up and replication of the CHOICE Program model by two Intersect for Ability organizations (Park Lawn and UCP Seguin). The initial participants in those programs will be individuals currently enrolled in an existing day service in these two organizations who are known to be dissatisfied with their current program model.
- The replication of the CHOICE Program by Clearbrook. The initial participants at the second Clearbrook CHOICE Program location will be individuals currently enrolled in an existing day service at two Clearbrook programs who are known to be dissatisfied with their current program model. This would reduce the capacity of these large programs as part of their downsizing and an overall shift in day service delivery.

***Year Two***

- The development of a manual that will guide service providers through the start-up, implementation and evaluation of the CHOICE program model. Of note, the manual will include the invaluable "lessons learned" as a result of the four CHOICE programs that will be operational at the end of Year One. While the four programs will share many attributes, each will also have (some) unique considerations that will expand the manual's value to a broader base of service providers.

<b>Expected Outcome</b>
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| <ul style="list-style-type: none"><li>• By 10/1/15, each program space is ready for clients.</li><li>• By 9/30/16, each program provides day services for up to 40 clients and is self-sustaining.</li><li>• By 9/30/17, the manual is complete.</li><li>• Program participants and families/guardians report significant satisfaction with the program.</li><li>• Census of persons served by legacy programs is reduced.</li></ul> |
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## Program Budget

Major budget elements include:

- First year rent of three program sites in office or storefront locations at \$60,000 per agency (\$5,000 per month) based upon pilot (27% of request)
- Purchase of one passenger/cargo van and lease of second van for each of the three programs at \$48,000 per agency (22% of request)
- Furniture for program sites including one mobile lift, tables, chairs, cabinets and other items for three program sites totaling \$92,050 (14% of request)
- Renovations of program sites including materials/labor to renovate 2 bathrooms and kitchens for accessibility at \$20,000 for each program site (9% of request)
- One year of staffing for on-site implementation of program at three sites representing 0.5 FTE per agency and staff to coordinate development of manual representing 0.1 FTE, totaling \$50,000 (7% of request)
- IT expenses including network/infrastructure, installation of phone system, voicemail, computers as well as iPads and applications for participants use to support individual interest/choice and one television per site, totaling \$39,300 (6% of request)

## Prior Grants

<b>Last Grant Date:</b>	1/9/2015
<b>Last Grant Amount:</b>	\$7,000.00
<b>Number of Prior Grants:</b>	13
<b>Total Amount Granted:</b>	\$1,168,800

## Recommendation

The Immediate Outcome of our Disabilities Impact Plan is that “grantees must discern the vocational and residential goals of program participants and facilitate their efforts to achieve them.” The CHOICE pilot provided a proof of concept of a new method to achieve this goal with respect to the employment and related activities. Having participated in this pilot as well as in CFI-funded training in customized employment methods, Clearbrook, Park Lawn and UCP Seguin are poised to replicate the pilot program.

The pilot proved the economics of the model as well as Clearbrook’s initial efforts are now sustainable based upon funding through the Illinois Medicaid Home and Community Based Waiver program for adults with developmental disabilities.

The CHOICE program not only establishes a pathway for local agencies to transition services to meet changing client needs and expectations but it may serve as a model for transitions occurring nationally. The piloting and potential expansion of CHOICE is a significant sign of the impact of Intersect for Ability on member agencies and the field. The program arose from conversations within the network. It was piloted and shadowed by network partners and is now poised for an expansion which will set the stage for more organizations to adopt it. Without CFI’s support for the network, it is unlikely this innovative program approach would have been developed and implemented.

We recommend approval of this proposal to bring it to the next stage.

<b>Clearbrook</b>			
<b>Discovering CHOICE</b>			
<b>Submission Date:</b>		<b>May 4, 2015</b>	
		<b>Year One</b>	
<b>REVENUE</b>			
	<b>Funds Needed</b>	<b>Funds Requested</b>	<b>Funds Committed</b>
Coleman Foundation	617,650	617,650	
Private donations/grants	15,000	15,000	
Organizational contribution	161,291		161,291
<b>Revenue Total</b>	<b>793,941</b>	<b>632,650</b>	<b>161,291</b>
<b>EXPENSE</b>			
	<b>Project Budget</b>	<b>Coleman Funds</b>	<b>Other Sources</b>
<b>Personnel</b>			
Project Director	15,645		15,645
Director of Day Services	8,823		8,823
Director of Community Employment/Job Dev	42,123		42,123
Coordinator of Day Services	56,700		56,700
Client Services Manager	45,000	45,000	
Project Coordinator/Guide Development			
<b>Consultants</b>			
Project Manager/Evaluation	20,000	20,000	
Technical Writer			
Clerical Support			
<b>Staff Recruitment/Training</b>			
Staff Training	45,000		45,000
<b>Capital</b>			
Vehicles	144,000	144,000	
Rent	180,000	180,000	
Renovation	60,000	60,000	
<b>Kitchen</b>			
Appliances/Dishes	6,000	6,000	
<b>Furniture</b>			
Program Tables	6,750	6,750	
Program Chairs	22,500	22,500	
Conference Room Tables	4,800	4,800	
Conference Room Chairs	4,500	4,500	
Work Stations/Staff Office Furnishings	9,000	7,500	1,500
Mat Table	4,500	4,500	
Lift	27,000	27,000	
Storage Cabinets	15,000	13,000	2,000
Client Personal Storage	1,500	1,500	
<b>Technology/Electronics</b>			
IT Start Up	25,500	25,500	
IT Monthly Expenses	1,500		1,500
Training Equipment	3,000		3,000
iPads and Applications	12,000	12,000	
Television	1,800	1,800	
<b>Program Materials</b>			
Educational Materials	12,000	12,000	
<b>Office Equipment</b>			
Shredder	1,800	1,800	
Laminator	1,200	1,200	
Fax Machine	600	600	
Copier	11,700	11,700	
<b>Printing</b>			
Printing of Guide			
Graphic Design			
<b>Travel</b>			
Partners/Consultants	4,000	4,000	
<b>Total</b>	<b>793,941</b>	<b>617,650</b>	<b>176,291</b>

<b>Clearbrook</b>			
<b>Discovering CHOICE</b>			
<b>Submission Date:</b>	<b>May 4, 2015</b>		
		<b>Year Two</b>	
<b>REVENUE</b>	<b>Funds Needed</b>	<b>Funds Requested</b>	<b>Funds Committed</b>
Coleman Foundation	50,000	50,000	
Private donations/grants	15,000	15,000	
Organizational contribution	108,291		108,291
<b>Revenue Total</b>	<b>173,291</b>	<b>65,000</b>	<b>108,291</b>
<b>EXPENSE</b>	<b>Project Budget</b>	<b>Coleman Funds</b>	<b>Other Sources</b>
<b>Personnel</b>			
Project Director	15,645		15,645
Director of Day Services	8,823		8,823
Director of Community Employment/Job Dev	42,123		42,123
Coordinator of Day Services	56,700		56,700
Client Services Manager			
Project Coordinator/Guide Development	5,000	5,000	
<b>Consultants</b>			
Project Manager/Evaluation	5,000	5,000	
Technical Writer	20,000	20,000	
Clerical Support	5,000	5,000	
<b>Staff Recruitment/Training</b>			
Staff Training			
<b>Capital</b>			
Vehicles			
Rent			
Renovation			
<b>Kitchen</b>			
Appliances/Dishes			
<b>Furniture</b>			
Program Tables			
Program Chairs			
Conference Room Tables			
Conference Room Chairs			
Work Stations/Staff Office Furnishings			
Mat Table			
Lift			
Storage Cabinets			
Client Personal Storage			
<b>Technology/Electronics</b>			
IT Start Up			
IT Monthly Expenses			
Training Equipment			
iPads and Applications			
Television			
<b>Program Materials</b>			
Educational Materials			
<b>Office Equipment</b>			
Shredder			
Laminator			
Fax Machine			
Copier			
<b>Printing</b>			
Printing of Guide	9,000	9,000	
Graphic Design	2,000	2,000	
<b>Travel</b>			
Partners/Consultants	4,000	4,000	
<b>Total</b>	<b>173,291</b>	<b>50,000</b>	<b>123,291</b>

<b>Clearbrook</b>			
<b>Discovering CHOICE</b>			
<b>Submission Date:</b>		<b>May 4, 2015</b>	
		<b>Total Project Budget</b>	
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<b><u>REVENUE</u></b>	<b><u>Funds Needed</u></b>	<b><u>Funds Requested</u></b>	<b><u>Funds Committed</u></b>
Coleman Foundation	667,650	-	-
Private donations/grants	30,000	-	-
Organizational contribution	269,582	269,582	269,582
<b>Revenue Total</b>	<b>967,232</b>	<b>269,582</b>	<b>269,582</b>
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<b><u>EXPENSE</u></b>	<b><u>Project Budget</u></b>	<b><u>Coleman Funds</u></b>	<b><u>Other Sources</u></b>
<b>Personnel</b>			
Project Director	31,290	-	31,290
Director of Day Services	17,646	-	17,646
Director of Community Employment/Job Dev	84,246	-	84,246
Coordinator of Day Services	113,400	-	113,400
Client Services Manager	45,000	45,000	-
Project Coordinator/Guide Development	5,000	5,000	-
<b>Consultants</b>			
Project Manager/Evaluation	25,000	25,000	-
Technical Writer	20,000	20,000	-
Clerical Support	5,000	5,000	-
<b>Staff Recruitment/Training</b>			
Staff Training	45,000	-	45,000
<b>Capital</b>			
Vehicles	144,000	144,000	-
Rent	180,000	180,000	-
Renovation	60,000	60,000	-
<b>Kitchen</b>			
Appliances/Dishes	6,000	6,000	-
<b>Furniture</b>			
Program Tables	6,750	6,750	-
Program Chairs	22,500	22,500	-
Conference Room Tables	4,800	4,800	-
Conference Room Chairs	4,500	4,500	-
Work Stations/Staff Office Furnishings	9,000	7,500	1,500
Mat Table	4,500	4,500	-
Lift	27,000	27,000	-
Storage Cabinets	15,000	13,000	2,000
Client Personal Storage	1,500	1,500	-
<b>Technology/Electronics</b>			
IT Start Up	25,500	25,500	-
IT Monthly Expenses	1,500	-	1,500
Training Equipment	3,000	-	3,000
iPads and Applications	12,000	12,000	-
Television	1,800	1,800	-
<b>Program Materials</b>			
Educational Materials	12,000	12,000	-
<b>Office Equipment</b>			
Shredder	1,800	1,800	-
Laminator	1,200	1,200	-
Fax Machine	600	600	-
Copier	11,700	11,700	-
<b>Printing</b>			
Printing of Guide	9,000	9,000	-
Graphic Design	2,000	2,000	-
<b>Travel</b>			
Partners/Consultants	8,000	8,000	-
<b>Total</b>	<b>967,232</b>	<b>667,650</b>	<b>299,582</b>