

A SUCCESSFUL TRANSITION TO MORE INDEPENDENT LIVING

LEARNINGS FROM THE SUMMER FOUNDATION'S
HOUSING & SUPPORT DEMONSTRATION PROJECTS



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PART 1

1. ABOUT THIS REPORT

This report outlines the model and activities involved in helping people with complex support needs transition towards greater independent living.

The Summer Foundation's housing work is primarily aimed at showing that people with complex support needs can live an ordinary life in the community.

In the 10 years since the Summer Foundation was established we have been changing human service policy and practice related to young people with complex support needs using a range of strategies to influence health, housing, aged care and disability services.

The Summer Foundation is not able to implement all of these strategies in isolation – we collaborate with other organisations, government, people with disability and their families to achieve this. Supporting, informing and empowering people with disability and their families is critical to resolving the issue of young people in nursing homes.

We strive for innovation by collaborating across sectors and disciplines, and taking calculated risks to create positive change.

THE FOCUS

This report sets out the current understanding of what is required to support a tenant with complex support needs to successfully transition to living in their new home, pursuing their goals and aspirations with as much independence and confidence as possible.

The report draws on insights from the Summer Foundation's first demonstration project in Abbotsford, Victoria and from current work in the second demonstration project in the Hunter region, NSW. Understanding what constitutes good practice in transition planning will be refined through feedback from tenants and their close supports, reflective practice amongst key individuals and organisations supporting tenants and through formal evaluation.

What this document covers:

- Background about the housing and support demonstration projects
- Learnings to date about successful transition planning from the first demonstration project
- Effective transition planning – context and key practice insights and issues
- The core principles of effective transition planning and the outcomes that indicate a successful transition process
- Roles and expectation of key players in the transition process
- Issues associated with supporting ongoing refinement of good practice in transition support
- An outline of the five key stages in the transition process and what each stage involves

2. INTRODUCTION

The Summer Foundation is establishing a number of housing and support demonstration projects to shift the paradigm of thinking in Australia about housing options for people with complex support needs, many of whom end up inappropriately living in residential aged care. The introduction of the National Disability Insurance Scheme (NDIS) is focussed on increasing the independence, social and economic participation of people with disabilities. The NDIS provides significant new opportunities for people with complex support needs to receive funding for the range of assistance they need to live with greater independence, including technology, equipment and home modifications.

The Summer Foundation demonstration projects align with the aspirations of the NDIS. They are being established to contribute to better understanding of the housing and support models that enable people with complex support needs to achieve their aspirations and live with greater independence.

HOUSING DEMONSTRATION PROJECT OVERVIEW

The Summer Foundation established housing demonstration projects to develop a better understanding of how people with complex support needs were best supported to live an ordinary life in the community with as much independence as possible.

The demonstration projects have a strong focus on supporting tenants to:

- Live their life with as much autonomy and independence as possible
- Have as much control over their home environment as possible
- Have a home environment that can support maintenance of family roles and contact with friends and family
- Be connected with others and included in the community as fully participating citizens

The demonstration projects have a number of key elements:

- Location is close to services and public transport
- Design is based on universal design principles and incorporates many accessible and adaptable design features
- Use of clever communication systems and smart home technology
- A support approach focused on building tenant capability for sustainable independent living

There are currently two demonstration projects. The first project was initiated in 2012 in collaboration with Common Equity Housing Ltd, the Transport Accident Commission/Residential Independence Pty Ltd and annecto. The project has six fully accessible, self-contained, one-bedroom apartments in a mixed private and social housing development in Abbotsford in inner-Melbourne, Victoria. The support funding context for this project was pre NDIS.

The second project has been established in the Hunter region of New South Wales, an NDIS trial site area. Ten apartments were purchased in a 110-unit private apartment development. An additional apartment was also purchased to provide a base for 24-hour support staff. The project is being implemented in collaboration with Ability Options and Pacific Link Housing. The first tenants moved into their units in mid 2016.

THE CHARACTERISTICS OF DEMONSTRATION PROJECT TENANTS

Tenants of the demonstration projects have been selected from people living in residential aged care, hospital rehabilitation units directly after significant injury, group homes or with family (following, for example, a catastrophic brain injury).

The target age group for tenants is people aged 21-55 with acquired or late onset disabilities in, or at risk of entry to, residential aged care, seeking to develop their capacity for greater independent living.

For this group of people the opportunity to move to a new home and live more independently is a major life event. It is a time of immense change that is exciting and challenging. In many instances the move is also a major life event for the whole family, whose relationships and lives may have been severely impacted by a traumatic accident, neurological disease or medical crisis that has resulted in significant disability for one of their close family members.

To support a person with multiple and complex needs to successfully establish a more independent life in a new home requires significant planning and attention to detail. The process required is usually complex and multifaceted and involves many different people over many months.

Consistent with a focus of supporting independence, specific selection criteria include the following:

- A strong desire to live independently and willingness to take responsibility for achieving this
- Willingness to use any technology that is provided to support and enhance independence
- Capacity to successfully live in an apartment development in close proximity to multiple neighbours
- Ability to understand and fulfil personal responsibilities (with support as required) associated with being a tenant with a Residential Tenancy Agreement
- The location is appropriate for the person - either supporting ongoing connection with family, friends and interests or is a suitable location to build a more independent lifestyle
- Willingness to participate actively in the evaluation of the project

Confirmed or anticipated eligibility for NDIS individual support funding and NDIS Specialist Disability Accommodation (SDA) funding is also a key requirement.

3. LEARNINGS FROM THE ABBOTSFORD DEMONSTRATION PROJECT

Implementing effective transition processes and allocation of adequate financial resources for this was a high priority in the Abbotsford demonstration project. The selected support provider for this first demonstration project, annecto, developed and refined the model of transition support. The organisation's person-directed planning process underpinned its practice approach.

Participants were connected to one person, a transition and inclusion facilitator appointed by annecto, to provide specialised transition and inclusion support for at least the first two years of a participant's time with the project, including the period before moving. This role was considered a skilled and professional role that was highly flexible and focused on supporting each person in a manner appropriate to their circumstances and aspirations. The role also had a strong focus on proactively seeking solutions when challenges arose.



SUPPORTING A SUCCESSFUL TRANSITION FOR TENANTS

The transition and inclusion facilitator role underpinned the service model in the initial two-year phase of the project. The role and its practice approach has been central to the success of the project. The core objectives of the transition and inclusion facilitator are:

- Supporting participants to set clear goals based on their considered views about what they want to achieve in their new home
- Continuing to support participants to build their capability in central aspects important to living more independently in a sustainable manner
- Ensuring that there is a coordinated approach between all people involved in supporting the tenant and clarity in the roles and expectations of all who are involved

The transition and inclusion facilitator individually supported each of the six project tenants with activities including:

- Coordinating each tenant's individual plan for transitioning to and establishing themselves in their new home
- Helping establish and maintain circles of support and personal networks
- Working with the participant and others on key supports
- Helping to build capability of the tenant, and those around them, for self-direction
- Establishing community connections and partnerships
- Building and maintaining relationships with specialist supports and other service providers such as allied health

Our experience shows that there are three success factors that impact a tenant's outcome:

- **Intensive and individually tailored support** and assistance as they plan for their move to their new home.
- **Continuity of personnel** to the tenant as they settle in. Continuity in the person providing the transition support across planning for the move, the moving in and the post move settling in period ensures a deep knowledge of the tenant's strengths and vulnerabilities.
- **A tested and trusted relationship** supports tenants at times when heightened anxiety is likely. This role has also been central to ensuring capacity to identify quickly when there is a need to adjust the environment or the daily supports in response to new insights; without this there can be a threat to maintaining the tenant's confidence in their capability to establish a successful life in their new home.

The specific focus of the transition and inclusion facilitator role changed during the various stages of the first two years of the tenant's involvement with the project. While the length of different stages varied between tenants, and there was some overlap between stages, conceptually the stages can be understood as follows.

i. Planning to move to a new home: typically 3-6 months

The focus in this stage is supporting people to plan their move to a new home and supporting them to consider aspects such as:

- What opportunities does living in this new home give me?
- What do I most want to achieve when living in my new home i.e. what are my goals and aspirations?
- How do I want to live my life in this new home and community?
- (Where relevant) What are my aspirations for my relationships with my family and children and friends (where appropriate) when in my new home?
- How do I want to be supported to achieve my goals and aspirations?
- How do I deal with anxieties or fears that arise when considering living more independently?

The focus of work with support networks varies in this stage depending on whether the person has a strong family/support network or limited support network. Where the person has family and close supports, then part of the role may need to include supporting the family to manage anxieties that may impact the participant achieving a successful transition.

This stage also includes active coordination of all the activities that need to come together to help the person make the move, including supporting participation by others (such as family, therapist, friends) in this process. While the role is more intense and extensive when the person has limited family or other supports, coordination of people's actual supports may actually be less complicated. Conversely, when families have strong involvement the role can become more complex, ensuring integration of various perspectives and that all efforts are working towards achieving the best outcome for the tenant.

ii. The settling in process: 3-6 months post move

The Abbotsford experience showed that moving to a new home can be highly stressful for people with complex support needs. In some circumstances, every aspect of their life and routines can be new. Anxiety about being alone and feeling very vulnerable can also set in. Despite the best planning efforts, it should be anticipated that things do not go according to plan. Support plans, support routines, dealing with the built environment and technology are all likely to need adjustment. New issues or opportunities that had not been anticipated may also arise.

The moving in stage is exciting, but can be tough and tenants are confronted with the realisation of how much change they need to manage, for example:

- New personal care routines in a new environment with new equipment and often with new support workers
- Being alone more without constant family or staff presence
- Having more personal responsibility for your home and looking after it
- Far greater choice about when and what you eat, and what you do with your day
- More responsibility for everyday decisions

In this stage the transition and inclusion facilitator supports tenants to work through issues such as:

- What support do I need to manage all this change and not feel totally overwhelmed?
- What is the best way to establish all my new care routines and to get used to the new technology and equipment?
- What resources in the community are going to be useful to me and what support do I need to make use of them – e.g shops, recreation opportunities?
- What can I do when things don't go according to plans and expectations?

If people are not pro-actively supported to manage major challenges or anxieties that arise in the early months after moving in then the potential to achieve positive outcomes can be under threat. Often a coordinated approach between the tenant's individual planned support and the project's 24-hour emergency support staff is required.

iii. Supporting ongoing capability building to pursue individual goals: starts 3-6 months post move

It is usually after people begin to feel they are on top of all the new things they need to manage and organise that they feel they have time and energy to focus on longer-term goals and aspirations. This is also the point when they are most likely to start thinking through some of the more ordinary and ongoing aspects of living more independently.

In this phase the transition and inclusion facilitator works with tenants to:

- Build their capability for problem solving around normal and disability specific daily living challenges
- Identify what help they find most useful to address specific challenges
- Understand how they can get the best from their supports and what they can do to sustain support arrangements and maintain the team of support workers they have selected to work with them. This includes managing the relationship aspects of this where appropriate, such as treating staff providing support respectfully and not asking staff to do things that are unethical or inappropriate
- Reflect on their goals and refine them in response to new confidence and capability, understanding of new opportunities and changing preferences

OVERVIEW

In the Abbotsford project the intensive approach to transition and inclusion support was found to be particularly important for people with cognitive or behavioural challenges (such as those arising from an acquired brain injury) or mental health issues. These particular disabilities can present obstacles to a person building a positive, engaged and more satisfying life that has a focus beyond being a person with a disability.

The project in Victoria has demonstrated the importance of selecting tenants with a strong desire to live independently so that they have a high level of motivation to build their capability to live as independently as possible. However, experience through the second and third phases, outlined above, also demonstrated that despite this strong desire for greater independence, tenants can encounter significant challenges as they work through what it means for them on a day-to-day basis. These challenges could be for a range of reasons including, for example: cognitive processing issues associated with a brain injury; increased fatigue caused by anxiety and managing many changes; or simply remaining resilient at times that are stressful for everyone. Effective and strategic support based on understanding the reasons for the challenges is essential to keep tenants motivated to continue working towards their goals.

The following table sets out a summary of recommendations about transition planning drawn from research by Monash University related to the Abbotsford demonstration project.

LESSONS ABOUT TRANSITION PLANNING

Recommendations on strategies for transition planning to new models of housing and support

Adapted from Callaway, L. et al. Transition to supported community living: An environmental scan and qualitative experiences of TAC clients, ISCR Research Report, September 2015, Melbourne.

Pre move

- Start transition planning to the new setting as early as possible
- Appoint a transition planner to work with each person, who is engaged early and appointed as a key worker during transition
- Ensure pre-move site visits are available for future tenants and their support networks where available and appropriate
- Wherever possible, ensure the individual tenant is involved in support staff selection
- Maximise training of key stakeholders (e.g tenant, support staff, family members) in assistive technology use prior to the move, and/or over time once the person has transitioned to the new model
- Undertake access audits of the local neighbourhood pre move and provide mobility training for tenants as necessary, to build confidence and ability with independent travel
- The aspirations of the housing and support model need to be clearly and repeatedly articulated to both the individual and staff – the approach of doing tasks “with” rather than “for” people, and a focus on new options as a step in a pathway of community living is key
- Planning for home-based leisure and strategies are necessary to manage the sense of loneliness that may occur when people are moving from living with others to living alone
- It is important to acknowledge the role of the pre-move support network (e.g Shared Supported Accommodation, provider, family) in transition planning – this role may pose benefits or challenges to successful transition and thus should be considered, with the support network engaged where appropriate to do so

Post move

- Incidental audit of staff practices across time will be of benefit, as will skilled practice leadership and regular staff meetings
- A focus on minimising agency staff in order to maximize consistency of support is useful
- Structuring of daily routines and support provision based on person's preferences will influence participation
- Proactive health management and planning is necessary to manage secondary health conditions in community settings
- A focus on targeted skill development of home integration and community access is important
- Local service engagement – including a consistent GP, dentist or church – will benefit community linking in the new neighbourhood
- Regular reviews with tenants over time (and not just in the early post move) will elicit important findings and ensure a problem solving approach, with aspirations of individual and model at centre of this

4. EFFECTIVE TRANSITION PLANNING

– CONTEXT AND KEY PRACTICE INSIGHTS

The following outlines the context for transition planning in the demonstration projects and provides insights about transition planning that are important to understand and take into account when developing an effective approach.

It draws on insights from the Abbotsford demonstration project, from work in the Hunter, NSW, project and also practice wisdom developed by many people involved with the demonstration project through years of experience working with the project's target group.

As background to developing a transition process it is important to have a keen appreciation of the significance of the move to a new home for the selected tenants and their families. As indicated in the introduction the prospective tenants are usually currently living in residential aged care, hospital rehabilitation units directly after significant injury, group homes or with family (following, for example, a catastrophic brain injury). For this group of people and their families **moving to a new home to live more independently is a major life event that is usually both exciting and challenging.**



TRANSITION PROCESS – AN INVESTMENT IN SUPPORTING LONGER TERM OUTCOMES

The objective of the transition process is:

To ensure that everything is in place for the tenant to have the best chance of a successful and sustainable life in their new home where they can live in a manner consistent with their goals and aspirations

The goal of both demonstration projects is to demonstrate how new housing options can offer improved outcomes for people with complex support needs who want to live with greater independence. Part of the demonstration is to understand what it takes to support people to develop their capabilities to live with increased independence in a way that is sustainable and satisfying, manages their clinical needs and results in them having choice, control and confidence in their life. The focus on supporting people to build their capability to live successfully with more independence needs to be a core point of reference and remembered at all stages of transition.

TRANSITION SUPPORT PRE MOVE AND POST MOVE

The process of moving to a new home for people with complex support needs has many steps, requires significant detailed planning and adjustments to be made in regard to living life in a different location.

The experience of practitioners working with people with complex support needs and experience from the demonstration project indicates that most people with support needs that arise from physical and/or cognitive issues are likely to need around six months of planning before moving into a new home. One reason is to ensure everything is in place, including equipment, modifications and a skilled daily support team. Another fundamental reason is to allow people with a cognitive or executive function disability extra time and guidance to process information, make plans, make decisions, adjust to new routines and a temporary lack of structure and problem-solve new situations as they arise. Moving in before everything is planned and in place has the potential to undermine the confidence, competence and longer-term outcomes for the person.

Additionally, it may take many months post move for the person to settle into their new environment and for technology and equipment to be fine-tuned to support them as best as possible. It may take time for the person to build their capability to manage living in their new home, feel comfortable in their new routines and resolve key transition issues.

Ensuring the best outcome for the tenant to live a sustainable life in their own home in the long term is enhanced when investment is made supporting the tenant to set up their new life in their home and community and maximising the capacity of the physical environment, including technology and equipment. Long-term support costs are more likely to reduce when people feel confident and able to do more for themselves. Skilled mentoring/coaching to help tenants develop good problem-solving strategies and the ability to identify how they can contribute to avoiding unnecessary crisis situations is an important contribution to building confidence and capability.

SUPPORT AND TRANSITION COORDINATION

The experience of both demonstration projects shows that the best outcomes are achieved by having a central point of focus and accountability for transition coordination when multiple tenants are moving to the same project; this is best achieved by having a small team working with specific tenants.

Given the scope and scale of issues that need to be addressed during transition for people with complex support needs it works most effectively when the transition coordinator is able to fully focus on the transition process, rather than also undertake coordination of support roles for the tenant, especially during the pre-move planning stage.

A number of prospective tenants in the Hunter project had allocated funding for coordination of supports in their plan before starting transition planning, while others did not. The scope and level of funding for this provision has been varied among prospective tenants with access to such support.

Experience suggests that if the person has an existing arrangement for coordination of their supports it is best for this to continue to sustain the tenant in their current living arrangement before moving into their new housing. This enables a dedicated focus on the transition process by the transition coordinator. The transition coordinator will need to establish a good working relationship with the tenant's existing support coordinator.

A decision will need to be made on an individual basis about support coordination arrangements once the person moves to their new housing. If the existing support coordination role has a specialist function then it may be appropriate for that role to continue when the person moves into their new home. This person then works alongside the transition coordinator with arrangements determined as part of the transition planning process. If the function has been to, for example, coordinate supports while a person is in a residential aged care facility, then that role may no longer be relevant once the person moves into their new home. For some tenants the most effective arrangement will be for the transition coordinator to take on support coordination post move, until the end of the transition phase.

It is proposed that as part of the post-move transition process a review occurs with the NDIA planner about the tenant's ongoing need for support coordination and the nature and objectives of any ongoing support coordination the tenant requires, including consideration for any specialist clinical or behaviour support.

TRANSITION SUPPORT PROCESS SENSITIVITY TO TENANTS

While there is a broad framework and common principles that need to underpin the transition process, the approach for each person will be different and will require different levels and types of support from the transition coordinator and formal services.

For example, a person with no family support who has been living in a residential aged care facility for many years, with limited expectations about the possibility of moving out, may require significant support to visualise the opportunities associated with living more independently. Additionally, they may struggle to engage with goal setting and aspirational thinking because of difficulties generating ideas and thinking in an abstract, lateral way as a result of their disability.

For this person, the initial stages of transition preparation and support will take longer when compared to a person who has a physical disability without cognitive impairment, who may have been planning for many years to move into more independent housing but been restrained by inadequate resourcing, unsuitable housing and support options.

Where there is a family member, such as mother or spouse, who wants to play a key role in the detail of the transition planning, the way the transition coordinator works will be different to circumstances where there are no natural supports or family members do not want an active role.

CONTINUITY OF RELATIONSHIPS TO INSTIL CONFIDENCE

People are selected as tenants because living more independently is of central importance to them. However, experience suggests that this long-term aspiration and confidence in the ability to achieve their desire can become lost or forgotten in the intense and anxious process of planning to move and then moving into a new home. This situation should be anticipated by the transition coordinator and the tenant's wider support team, with strategies put in place to:

- Identify such circumstances quickly
- Provide targeted ways to remind all involved about the tenant's expressed long-term aspirations
- Provide individually tailored support to re-energise the tenant's confidence in, and commitment to, achieving their long-term aspirations through sensitive mentoring/coaching approaches and practical problem solving

When there is a tested and trusted relationship with the transition coordinator there is more likelihood for robust conversations with the tenant about rebuilding their confidence in their capacity to be independent and counter any short-term wavering in their commitment to achieve their goals. Having a person who has established links with all key supports the person requires can coordinate better informed support responses for the tenant when issues arise.

TRANSITION COORDINATION SUPPORT HOURS

In the establishment phase of the demonstration projects, planning had to allow for the support of multiple tenants (10 tenants in the case of the Hunter demonstration project) to prepare to move into their new home within a relatively short timeframe. Tenants all have complex support needs and often multiple types of disabilities as well as significant diversity in their circumstances, including current living environments, informal supports and financial resources.

Ensuring sufficient transition coordination capacity is important when planning for eight to ten new tenants moving in across a short time. Experience in the Hunter project showed that it is very challenging for one person to undertake the transition planning role for all tenants, particularly across the pre-move and moving in stage. On average each tenant required 4-6 hours per week of transition coordination support across a 12-month transition phase. However, how the need for this support is spread across the 12 months varied greatly between tenants.

The beginning phase of the planning stage can require an intensive amount of time spent with most tenants as the transition coordinator works to build a relationship with the tenant, gain an understanding of the tenant's goals and aspirations and their capabilities and vulnerabilities. Other times when intensive support is required varies between tenants. Some tenants need intensive support in the pre-move and move in phase; support at the time of moving in for some tenants can spread across multiple full days when no significant support is available from family or other natural supports. For some tenants it is the post-move period when they require more intensive support from the transition coordinator as they come to terms with the reality of living on their own and confront challenges with daily living routines.

Each tenant needs one consistent transition coordinator to work directly with them to develop their transition plan, ensure a coordinated approach to its implementation and to be the overall coordinator for that person for the 12-month process. Experience in the Hunter showed that for 10 tenants two transition coordinators were required, each working with a specific subgroup of tenants.

This small transition support coordination team needs to work closely together to ensure they, on a regular and frequent basis, share their insights and understanding to maintain a good overview of all tenant transition experiences so they can adjust practices quickly as new learnings emerge.

As indicated above there are peak times of activity and also tenants with intensive specialist needs. A useful approach for managing this could be to have one or more specialist additional practitioners available to focus on specific, time-limited aspects of the transition support process for particular tenants, supplementing the ongoing role of the transition coordinator. For example, a practitioner with an occupational therapy background could have a specialist focus on ensuring coordinated planning around equipment, technology and home modification requirements; they could also be the key liaison for any issues related to these aspects and liaise with support teams to ensure specialised staff training related to these aspects. For some tenants a specialist practitioner with a nursing background could work to ensure appropriate health plans are in place (developed by the person's health provider) and to ensure coordinated support is provided across the person's health support network for health related issues. This person could also be the liaison during the transition process with the direct support provider in relation to training individual support teams to implement health and other therapeutic plans.

INDIVIDUAL ONGOING SUPPORT TEAMS

Our experience shows that overall each tenant needs teams of six to eight support workers to cover a full week reliably. These workers all need to be well trained to understand the tenant's long-term goals and to support each tenant to build their capacity for living independently, including the use of technology. They also need to have a sound understanding of the tenant's individual support requirements and be aware of their personal preferences about how they are supported. A shortage of skilled disability support workers and a high casual workforce (created in part by the need for organisations to manage uncertainty of support funding in the NDIS funding environment) presents challenges in creating and maintaining skilled teams for each tenant.

Tenants have a key role in the selection of their direct support team and in the Hunter project it is taking some time for each team to be established and 'tested' by the tenants. To ensure a smooth move for the tenant, this support team needs to be in place before the tenant moves. While responsibility for the management of the support team is with the support provider, there is a need for good coordination and communication between all key people involved in the transition process to achieve as much stability as possible in each person's daily support team.

5. THE TRANSITION PLANNING PROCESS FOR DEMONSTRATION PROJECTS

This section uses the experience from the Summer Foundation's demonstration projects to outline the current understanding of what factors support effective transition. It covers the following:

- The principles that underpin the approach to transition planning
- Indicators of a successful transition process
- Stages of the transition process
- Roles of the various people who are key to supporting a tenant's successful transition to living with greater independence in their new home

CORE PRINCIPLES UNDERPINNING A GOOD TRANSITION

- i. Every part of the transition planning and implementation process is undertaken in a way that aligns with the tenant's goals, preferences and priorities and supports the tenant to develop their skills, insights and confidence.
- ii. The approach to transition is informed by a sound understanding of the specific vulnerabilities and risk factors associated with the person's complex support needs that, if not well addressed, could constrain their ability to successfully live independently. (This includes identifying, for example, significant health vulnerabilities, threats to maintaining functional capacity, behavioural issues and being able to resource and manage the impacts of these to ensure a successful transition for the tenant.)
- iii. The process involves the right people (i.e all the people with knowledge that is central to planning and implementing a successful transition process such as family, close friends, current support providers, allied health staff) and enables each person involved to contribute effectively and efficiently.
- iv. The process works to build collaborative relationships and trust with a sense of collective accountability for supporting the tenant to achieve their ambitions.
- v. The process builds respectful and solution-focused ways of managing issues or challenges that may arise.
- vi. The transition planning process is comprehensive and considers all key aspects that are important to ensuring the tenant is set up for successful and sustainable independent community living. (This includes consideration of both disability funded as well as mainstream funded supports).
- vii. The approach is flexible and dynamic and any significant new insights about needs or opportunities that emerge along the way can be readily incorporated into the process.
- viii. The process flows in a logical sequence with all components coming on stream at the right time.

INDICATORS OF A SUCCESSFUL TRANSITION

The follow are the Key Performance Indicators for assessing the quality of the transition into a new home:

- The tenant feels settled and is getting on with their ordinary life, focusing on longer term goals – increasing skills and capability, engagement in the community (rather than just focusing on getting used to all the new things associated with living in their apartment).
- The tenant has reached a stage where they feel safe and confident living in their apartment.
- The tenant's support plan reflects their present goals and funding and other resourcing (NDIS funded and mainstream services) are sufficient so the tenant can work towards them.
- Regular support routines are established and working well and demonstrate cost effective use of funded resources.
- There is an established process that supports coordination between all key services supporting the tenant (where this is in line with the tenant's wishes).
- The tenant is confident (or continuing to make good progress) in managing and negotiating their physical environment, i.e in their own unit, moving in and out of the building, navigating around the local community.
- Modifications and technology have been fine-tuned so that the tenant can do as much as possible for themselves (e.g bench heights, location of furniture and equipment, technology).
- The tenant's family and informal networks continue to be part of their life in line with desires for this or progress is being made to establish informal connections where they are lacking or have been lost.
- The tenant uses the 24-hour emergency support service appropriately (i.e consistent with its purpose to respond to unplanned support needs or emergencies).
- The tenant is meeting their obligations under their Residential Tenancy Agreement.
- There is clarity for tenants about who to go to for troubleshooting when different challenges and situations arise.

TRANSITION STAGES

What the demonstration projects have taught is that there are five stages in the transition process across approximately 12 months, averaging six months pre move and six months post move. There will be some variation in lengths of different stages for individuals depending on their particular circumstances, the nature of their disabilities and support, equipment, technology and modification needs.

These stages are:



STAGE 1:
INITIAL ENGAGEMENT WITH TENANT
(indicative time - 2 weeks)



STAGE 2:
UNDERSTANDING THE TENANT'S GOALS AND DESIRED
OUTCOMES FOR LIFE IN THEIR NEW HOME
(indicative time - 4 weeks)



STAGE 3:
DEVELOPING A TRANSITION PLAN
(indicative time - 2-3 weeks)



STAGE 4:
IMPLEMENTING THE TRANSITION PLAN
(indicative time - 3-6 months)



STAGE 5:
CONSOLIDATING THE TRANSITION
(indicative time - 3-4 months)

More detail on each of these stages is found in Part 2 of this document.

ROLES AND EXPECTATIONS OF KEY PLAYERS IN THE TRANSITION PROCESS

Many people need to be actively engaged to support and resource a successful transition for a tenant. The following table sets out the broad roles and expectations of each key player usually involved in supporting the tenant to establish their life in their new home, including the tenant themselves. This table does not reflect the internal set-up that different organisations involved in the transition process need to have in place to manage these responsibilities. It also does not include the ongoing day-to-day inter-organisational collaboration that needs to occur.

In our demonstration projects, the Summer Foundation undertook a comprehensive process to select support provider partners for each project and organised to provide the property and tenancy management services for the apartments. In the case of the Hunter project these organisations are Ability Options and Pacific Link Housing

Across the first two years of the project, which incorporates the tenant transition phase, the model has one key support organisation engaged to provide the core direct supports to tenants plus the transition coordination support. This was found to be highly effective in our first demonstration project for supporting good tenant outcomes.

KEY PLAYER	ROLES AND EXPECTATIONS
TENANT	<ul style="list-style-type: none"> • Be an active participant in the transition process • Determine their longer term broad goals and aspirations and also their more immediate goals to settle into their new home and community • Work on building skills and capability they know they need to prepare them for their transition to living more independently • Embrace the technology available and use it to support increased independence • Work with their support team to resolve any challenges when they arise
CLOSE FAMILY AND OTHER SUPPORTS	<ul style="list-style-type: none"> • Identify their aspirations for the tenant and identify how it fits with the tenant's own aspirations • Identify the ways they will be supporting the tenant during the transition process • Undertake specific activities they have committed to in support of a successful transition • Identify any personal or other support they might need as part of the transition so they can continue to be a key support for the tenant (where appropriate) • Work in partnership with others supporting the tenant's transition and resolve any challenges as they arise • When a family member or close friend is the legal guardian for the tenant – make timely decisions on the tenant's behalf as required, taking into account the best understanding of the tenant's preferences
TRANSITION COORDINATOR (Ability options in the Hunter project)	<ul style="list-style-type: none"> • Build a sound understanding of the tenant's aspirations, capabilities and support needs • Support the tenant in articulating their long-term goals and short-term priorities for the transition • Develop a transition plan that documents everything that needs to happen (as agreed by all key players), identifies who is responsible for each action and in what timeframes • Bring the team of people supporting the tenant's transition together to work in a coordinated and collaborative way and stay focussed on achieving the tenant's desired outcomes • Work alongside each tenant and their close supports to resolve any issues and challenges as they arise • Work with other members of the tenant's support team to help them contribute to transition planning and implementation in a timely manner • Ensure appropriate linkage with NDIS planning and funding processes, including advocating for tenant's goals and ensuring needs are adequately incorporated into their NDIS plans • Inform Summer Foundation in the event that there are challenges related to NDIS funding for supports • In collaboration with the property and tenancy manager and Summer Foundation (as required) arrange tenant access to the property prior to signing a lease to enable the tenant to become familiar with the features of their new home and the technology • Identify learnings from the transition process and opportunities for refining practices and sharing these insights with others as appropriate

KEY PLAYER

ROLES AND EXPECTATIONS

CURRENT NDIS FUNDED COORDINATOR OF SUPPORTS (or similar role)

- Continue support coordination for the tenant and resolve issues with current supports while tenant is waiting to move
- Provide insights about what the tenant has required in terms of assistance with their supports to the transition coordinator (with tenant permission)
- If the current role has a specialist focus – assist to resolve whether that is likely to continue to be required and how such an ongoing role can work in a complementary/supplementary way with the transition coordinator

TENANTS PRE-MOVE FORMAL SUPPORT PROVIDERS

e.g residential aged care service, disability group home, disability in-home support services

- Be open to providing any requested information and insights about the tenant's current support and aspirations
- Work out how to best help the tenant's direct support team for the new home understand the tenant's requirements through means such as information sharing (with tenant consent) or enabling shadow shifts for direct support staff etc.
- Support the tenant and their network to positively anticipate and prepare for the move

PROJECT DIRECT SUPPORT PROVIDER

(Ability Options in the Hunter Project)

- Develop a sound understanding of the tenant, their support needs and what is important to them in how they want their support provided
- Work to achieve a smooth transition from the tenant's existing support providers to new project support provider, including willingness to consider employing existing staff if tenant requests this
- Ensure the tenant is involved in selection of staff that will provide their individual support
- Ensure staff are well trained to meet the needs of the person from the first day they move in
- Seek regular feedback from the tenant on their satisfaction or otherwise with how they are being supported and identify any adjustment to support required
- Ensure quick resolution of issues

TENANT'S OCCUPATIONAL THERAPIST

- Assess needs for modifications, equipment and technology required to enable the tenant to live independently and safely. Liaise with Summer Foundation on these before a formal request for pricing quotations
- Identify skills development intervention that may be required to help the tenant live as independently and safely as possible
- Outline intervention required to help the tenant maintain functional capacities
- Work with the support provider to ensure support staff are adequately trained to provide the required therapeutic support

MEDICAL AND ALLIED HEALTH SUPPORTS

- Contribute their understanding of the tenant's specialist needs to the transition planning process (with tenant permission)
- Provide any documented health or therapeutic plans that need to be implemented by the support workers
- Contribute to ensuring ongoing collaboration and communication as required with others supporting the tenant

PROPERTY AND TENANCY MANAGER

(Pacific Link Housing in the Hunter Project)

- Meet tenants as part of the transition planning process to explain how the lease arrangements will work, their rights and responsibilities as tenants, and answer any queries tenants have
- Discuss with tenants the special conditions associated with living in an apartment development
- Arrange for tenant to sign lease and complete the property inspection report
- Provide tenant with information about when to contact the property manager and contact details
- Help tenant apply for rent assistance and/or bond assistance as required
- Provide help with utility connections as required

KEY PLAYER

ROLES AND EXPECTATIONS

SUMMER FOUNDATION

Summer Foundation in its role as the project facilitator

- Organise regular meetings of the Demonstration Project Working Group to provide a forum for key project partners to meet and share information, coordinate approaches and problem solve housing project issues
- Connect the tenant with the transition coordinator and ensure, with permission, they are provided with all relevant tenant-related information from the selection process
- Provide leadership in approaching the NDIA to develop a plan for a prospective tenant or review an existing plan that is not in alignment with demonstration project objectives (based on Summer Foundation knowledge of tenant through the selection process)
- Establish a reflective practice, action research, evaluation and knowledge strategies for the project
- Research and evaluate tenant outcomes and the impact of built design and technology

Summer Foundation in its role as the owner of the project properties

- Ensure timely completion of the building project and keep all parties updated regularly with anticipated dates of availability of properties and any associated issues
- Take responsibility for notifying tenants if any significant delays or changes to anticipated timeframes for moving occur
- Liaise with each tenant's occupational therapist regarding any modifications and inbuilt equipment and technology required; arrange for quotes to be provided to support NDIS funding application
- Introduce the tenant to the property and tenancy manager as required
- Ensure proactive development of a relationship with the Owners Corporation and speedy management of any issues that arise related to Owners Corporation, either directly or by delegating to a nominee
- Ensure, in association with the appointed property and tenancy manager, a streamlined process for undertaking modifications, installation of equipment and technology
- Ensure technology is tested and issues addressed quickly
- Ensure development of fire safety and evacuation plans for each tenant

NDIA PLANNER

- Address all tenant goals and key needs related to the move outlined in each tenant's NDIS plan
 - Be responsive to needs for change within plans and for complete reviews of the plan at critical times in the tenant's transition journey
 - Ensure mainstream and natural supports are identified and incorporated into plans, particularly when a tenant has no experience of independent community living and the types of supports that are available to assist them live more independently
-

6. ONGOING REFINEMENT OF GOOD PRACTICE

Moving to a new home is a major life event for people with complex support needs, especially those moving from institutional settings or away from family. Helping people plan their transition and establish themselves successfully in their new home has significant potential to build capability and confidence to live more independently. This is the case even faced with almost inevitable moments of doubt, frustration, anxiety and practical challenges.

Understanding how to support people with a range of complex support needs transition to a successful and sustainable life in their own home in the context of the opportunities provided by the NDIS is still evolving. The experience in the demonstration projects is making a contribution to this evolving understanding. This document sets out an initial framework for the transition process in the demonstration projects, building on learnings to date about effective practice approaches.

The following highlights two areas for consideration related to continuing to develop successful transition planning approaches within an evolving NDIS context.



CHALLENGES EXPERIENCED WITH CURRENT NDIS APPROACHES

The Summer Foundation's demonstration projects align with the principles and objectives underpinning the NDIS. The NDIS's approach to planning and funding is continuing to evolve and there have already been a number of changes to the approach to funding during development of the Hunter demonstration project, impacting the transition process. It is always anticipated that implementation of large-scale, new programs will go through many phases of refinement. Issues have been outlined below to document insights into current challenges associated with the transition process around supporting a group of people with complex support needs to move to their new home.

NOT ALL REASONABLE NEEDS ARE BEING FUNDED WHICH IMPACTS ON TENANT OUTCOMES

It needs to be anticipated that there may need to be a succession of refinements to NDIS plans and consequent funding requirements for people as they move through the transition phase, both in the pre-move phase as well as the immediate post-move phase. Examples of areas where inadequacy in existing plans can hinder a successful transition include: no allocation or an inadequate allocation for transition support coordination, no allocation for extra short-term support with skill development; no provision for behaviour support and neuropsychology specialist planning; and no allocation for staff training in specialised care and support routines for individual tenants. It is understood that there is flexibility in reallocation of resources within plans: however, some plans do not have sufficient resources allocated for this to be a practical solution.

Some types of equipment or support that will make a significant difference to longer term tenant outcomes are not being supported through NDIS planning processes. Some of this is likely to be because of the complex, individualised support needs of the person and the particular identified way of addressing those needs (which may be unfamiliar to the NDIS). There have always been challenges in past funding schemes when people with complex needs require different support or equipment responses. However, it is important to ensure that people with complex support needs have access to the supports and equipment they require in order to have the same opportunities to achieve their goals as other NDIS participants.

Examples of challenges experienced by tenants with inadequate funding to appropriately meet their needs include:

- A tenant with significant physical support needs only had their basic core needs funded, with no funding to support capacity building in their new home or funding specific to their goals;
- A person needed regular catheter changes but referrals to mainstream nursing/health services were rejected and this was omitted within the NDIS plans; this type of gap can create significant risks for people's health which is essential to maintain in order to support their ability to live in the community;
- Funding for essential therapy services (such as for occupational therapy and neuropsychology) was very limited for some tenants; also for many of the tenants needing this they need to be reviewed regularly and new plans put in place as new circumstances arise.
- Limited funding to enable individual support teams to meet and also for staff training hours to ensure support workers can provide effective support, particularly where supporting tenants who live with cognitive and behavioural challenges.

NDIS COORDINATION OF SUPPORT CATEGORIES AND TRANSITION ALIGNMENT CHALLENGES

It might be assumed that a role supporting tenants with complex support needs through the transition process to a new home would fit within the NDIS broad Support Coordination category (3.07). (The current NDIS categories are set out in the table following). But, experience in the demonstration projects revealed that it is difficult to fully align the transition coordination role for people with complex support needs moving to a new home with the current NDIS Coordination of Supports funding categories and the general level of hours allocated to these categories in individual NDIS plans.

Also, there is still lack of clarity about the NDIS resources available to support people with complex support needs looking for housing and to what degree transition planning is part of the support available.

Support Coordination

Support Connection: Time-limited assistance to strengthen participants' ability to connect with informal, mainstream and funded supports, and to increase capacity to maintain support relationships, resolve service delivery issues and participate independently in NDIA processes. (One of the ways this is achieved is through Local Area Coordination (LAC). LACs are Partners of the NDIA that operate at a local community level, enabling the NDIS to be implemented with consideration of issues within local communities.)

Support Coordination: Assistance to strengthen participants' abilities to connect to and coordinate informal, mainstream and funded supports in a complex service delivery environment. This includes resolving points of crisis, developing capacity and resilience in a participant's network and coordinating supports from a range of sources.

Specialist Support Coordination: The provision of Support Coordination within a specialist framework, necessitated by specific high level risks in the participant's situation. This support is time-limited and focusses on addressing barriers and reducing complexity in the support environment, while assisting the participant to connect with supports and build capacity and resilience. It may also involve development of an intervention plan, which will be put in place by disability support workers.

Source: NDIS Price Guide VIC/NSW/QLD/TAS Valid from 1 July 2017 (version release date: 30 October 2017)

Experience in the demonstration projects is indicating that the transition coordination role undertakes functions across three of the current NDIS categories for Support Coordination namely: Support Connection, Support Coordination and Specialist Support Coordination. Resolving how to best approach funding this role to deliver transition coordination support for people with complex support needs moving to a new home in line with the evolving good practice appears an important issue to address.

Based on insights emerging from the transition coordination role with the current tenants selected for the Hunter demonstration project it is estimated that an average allocation of 4-6 hours per week is required to support a person through the five stages of the transition process outlined in this report.

BUILDING AN EVIDENCE BASE FOR GOOD TRANSITION PRACTICE

The following sets out important questions worth considering to further develop our understanding about effective transition processes and practices. There are also questions to gain insight into what might be a cost-effective allocation of resources for the transition process within the NDIS when costs over a lifetime, rather than individual short-term support items, are important.

Tenant perspectives on transition support

- What assistance provided by the transition coordinator did tenants find most useful?
- What would have improved the tenant's transition experience?
- What has supported you most in transitioning to your new home?
- What have been the main challenges for you with planning for your move, your move in and settling into your new home?

Better understanding effective transition support practice

- What are the main aspects of transition support that the transition coordinator needs to spend time on and how does this vary across tenants with different circumstances, disabilities and support needs?
- What are the key issues to address in transition planning to achieve a successful outcome and how does this vary for individuals?
- What aspects of transition support most assist a tenant to have a success outcome?
- What are the main challenges of supporting a tenant to achieve a successful transition and what could mitigate these challenges?
- What assistance was considered the best support for tenants preparing to live as independently as possible?
- How long does it take post move for people to settle into their daily life routines in their new home and community? How can the transition process support this to happen as quickly as possible?

Organisational arrangements

- How does the transition coordinator most effectively structure their working relationship with the support provider, the housing owner and the tenancy and property manager?
- What are the strengths and weaknesses of the transition coordinator being employed by the same organisation selected to provide the core supports to tenants in the demonstration project?

Cost benefits of investment in transition planning

- What transition support practices have the potential to have most impact on a person's ability to live with as much independence as possible in a sustainable way and achieve cost savings for the NDIS in the longer term?

PART 2

STAGES AND DETAILS OF THE TRANSITION PROCESS

Experience from the demonstration projects show there are five stages in the transition process which happen over approximately 12 months – six months pre move and six months post move. There is some variation to the timeframe for each individual. These stages are:



STAGE 1:
INITIAL ENGAGEMENT WITH TENANT
(indicative time – 2 weeks)



STAGE 2:
UNDERSTANDING THE TENANT'S GOALS AND DESIRED
OUTCOMES FOR LIFE IN THEIR NEW HOME
(indicative time – 4 weeks)



STAGE 3:
DEVELOPING A TRANSITION PLAN
(indicative time – 2-3 weeks)



STAGE 4:
IMPLEMENTING THE TRANSITION PLAN
(indicative time – 3-6 months)



STAGE 5:
CONSOLIDATING THE TRANSITION
(indicative time – 3-4 months)



STAGE 1: INITIAL ENGAGEMENT WITH TENANT

The Summer Foundation collects detailed information about the applicants as part of the tenant selection process and seeks the permission of successful applicants for this information to be passed on to the organisation undertaking the transition coordination role.

The available information includes detailed occupational therapy assessment, a range of other key medical/allied health/professional reports and any NDIS plan and other plans that are in place. This documentation provides important early insights about potential issues that need to be taken into account when meeting the tenant for the first time. Specific communication issues or requirements for interaction with the tenant will be in the available documentation.

The organisation providing the overall transition coordination role is expected to ensure that they have implemented their required organisational processes for intake of new participants.

Approach

The meeting with the tenant should be set at a time and location convenient to the participant and any family/friends or other key supports they want involved.

Wherever possible, the Summer Foundation staff member who has built a relationship with the tenant and their close supports through the tenant selection process will introduce the transition coordinator to the tenant.

Desired outcome from this stage

- Detailed understanding of the current services and supports the person is receiving (including informal and mainstream supports) and how these will continue throughout the transition process
- Identifying if there is an existing support coordinator from another organisation and understanding their current roles and scope of responsibilities
- Set times for future appointments that are suitable to the tenant
- Establish the tenant's preferred communication approach throughout the transition planning process (e.g. email, text, mobile, home phone as preferred contact method)
- Develop initial organisational agreements with the tenant or their formal guardian including:
 - Service agreement related to the transition support process to provide clarity about what is to be provided, respective responsibilities and complaints and other organisational processes
 - Permission to share information (and who with) to support effective transition planning

Indicative timeframe

Initial meeting to be held within two weeks of the offer of tenancy being made by the Summer Foundation to the tenant.



STAGE 2: UNDERSTANDING THE TENANT'S GOALS AND DESIRED OUTCOMES FOR LIFE IN THEIR NEW HOME

This is the critical stage to support the tenant and their close support network (as relevant) to articulate their key goals and aspirations for life in their new home. This stage will require a number of conversations and a thorough understanding of the strategies required to support people with a cognitive disability to engage meaningfully in the process. Additionally, it will take longer if people have been in living in institutional settings for a number of years.

Approach

The tenant needs to be supported to think through and visualise their future life, focusing on aspirational desires and the more grounded requirements of daily living. Questions that can support this process include:

What opportunities does living in this new home give me?

- What do I most want to achieve when living in my new home i.e what are my goals and aspirations?
- How do I want to live my life in this new home and community?
- (Where relevant) What are my aspirations for my relationships with my family and children and friends (where appropriate) when in my new home?
- How do I want to be supported to achieve my goals and aspirations?
- How do I deal with anxieties or fears that arise when considering living more independently?

Extra questions that might prompt a tenant to think about practical details include:

- What support do I need to manage all this change – and not feel totally overwhelmed?
- What is the best way to establish all my new support routines and to get used to the new technology and equipment?
- What resources in the community are going to be useful to me and what support do I need to make use of them – e.g shops, recreation opportunities?
- How can I prepare myself for times when things don't go according to plan or expectation?

It is also important to consider who should be involved at this stage in helping the tenant with these questions and what they might see as the areas the tenant needs most help with to build skills and capacity.

Questions can include:

- Who is supporting me now or knows me well and can provide helpful insights to plan for my future success in living more independently?
- What are the things I most want to do, or know I need to do, to build my confidence and capacity to live as independently as I can and work on achieving my long-term goals and aspirations?

There are many different person-centred/directed planning tools that can be used to help develop an understanding of the tenant's goals and aspirations and what they need to help them to achieve these.

A wide range of information and insights will need to be gathered from a number of sources including the tenant, their informal supports, their current service providers, any existing coordinator of supports and medical and allied health professionals. Health and therapy plans/reports and the NDIS plan should be considered when supporting tenants develop their goals. Overall the approach should be holistic and encompass all key life areas and support needs as well as capturing the future goals and aspirations of the person.

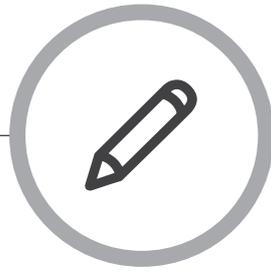
Desired outcome of this stage

A sound and documented understanding by all involved of the tenant's goals and aspirations and the things that need to happen to achieve them when the tenant moves into the new home.

Identification of any additional specialist assessments or other information that may be required to fill gaps in understanding of needs, capacities and how supports are best provided.

Indicative timeframe

Initial information to be collected during the first month of engagement with tenant and will continue to be supplemented through the planning and implementation stages as required.



STAGE 3: DEVELOPING A TRANSITION PLAN

The transition plan can be documented in many forms but it is key that it has the following:

- Clear documentation of the tenant's overall aspirations and more detailed priority goals for the moving in and settling in phase
- An outline of what needs to be done to support a successful transition, who is to be involved and key timeframes
- For people experiencing cognitive challenges, the plan should include a summary of the person's strengths and challenges associated with their cognitive and executive skills with a clear description of the strategies required to assist in compensating for any challenges
- Any essential clinical or other supports that are required (e.g support with decision making), where the tenant may not be able to identify them due to cognitive or communication issues

From the tenant's perspective it is about "What needs to happen for me to: successfully move to, and establish, my life in my new home; who needs to be involved; and what do we each need to do to make it work for me?"

Approach

The goals, needs and wishes of the tenant identified in Stage 2 are the foundation for the transition plan.

For those tenants who have never experienced living independently or have a cognitive impairment after acquiring their disability, it is often difficult for them to anticipate and think through all the factors that will support them to achieve their goals and aspirations and develop and sustain their ability to live successfully with as much independence as possible. This is where the wisdom and expertise of the range of people involved in supporting the person needs to be drawn on to build a plan that best supports the person achieve their ambitions. The Summer Foundation Housing Toolkit has helpful checklists to promote detailed thinking about various aspects that need to be considered in a transition plan. (See appendix A in the Toolkit.)

The transition coordinator will work with the tenant and their close supports (as appropriate) to help the tenant identify and prioritise their goals and what strategies to put in place to achieve them. Broader, logistical issues around moving house also need to be planned at this stage.

It will be important to identify the current "natural" supports the person has access to, beyond immediate family who may be involved directly in the planning process. Having an understanding of potential opportunities for community participation is a key consideration.

This is the time to think about what areas the tenant may need support with to prepare for their move. Examples include: activities of daily living such as budgeting skills or creating a shopping list; planning and organising events such as medical appointments or social outings; creating routines to compensate for memory difficulties such as morning routine or shopping routine; as well as functional physical goals such as building strength in their arms to support safer and more independent transfers.

This is when any current NDIS plan needs review to determine how well it aligns with what needs to be achieved to support the tenant to prepare for their move. Examples include: developing budgeting skills, learning to heat up meals in the microwave, developing strategies for remembering medication or appointments. A key element of this stage will be supporting the tenant to request an NDIS plan review meeting with the NDIA if the current plan does not include adequate funding, including any modifications, equipment and technology needs.

The approach needs to take into account that planning is a continuous process that explores the ongoing and changing needs of the person throughout transition.

The following range of information is usually included in the plan (or supporting documentation) to ensure everyone knows what needs to happen and it is clear who is responsible for specific actions:

- Agreed goals and actions based on information in the current NDIS plan and new insights about priority goals and actions emerging through Stage 2. The goals need to be supported by well-documented tasks to ensure goal realisation
- The areas of the person's life that are of most concern to him/her and the people who care about him/her are clearly documented
- The plan includes timeframes and an outline of roles and responsibilities for all involved

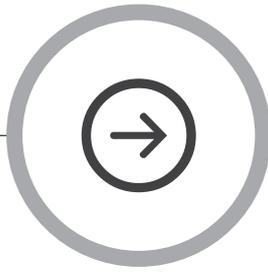
Desired outcome of this stage

The plan is documented and presented in a person-centred way that is clear and relevant to the tenant. It identifies goals and sets out implementation strategies that are realistic and achievable as well as specific actions, including who will be responsible and when specific actions need to be completed.

There is clear agreement between the key players in the process about how implementation of the plan will be monitored and how progress in implementation is documented and communicated

Indicative timeframe

Initial plan for review by the tenant and everyone with a central role in supporting the tenant should be developed within two-three weeks after the completion of discussions and assessments.



STAGE 4: IMPLEMENTING THE TRANSITION PLAN

This stage involves putting the transition plan into action to enable the tenant's desired goals and outcomes to be achieved.

Approach

Active participation and engagement by the tenant and their informal supports in the implementation of the transition plan is a key priority for the transition coordinator to encourage.

Ongoing assessment of the effectiveness and relevance of the strategies in place is required and discussion about adjustments required may be necessary with the tenant, their informal supports and other services supporting the tenant. These often arise after practical insights about the tenant's capabilities are gained and their level of resilience in the face of multiple changes emerge as they get closer to their move. Any changes may require another review of alignment with the NDIS plan and associated funding.

The transition coordinator has a vital role in fostering positive relationships with everyone involved in implementing the plan. Everybody involved should be informed of and understand their role and that of others in the plan. Everyone needs to be aware of the expectations and the importance of their role as outlined earlier in the table in Section 5 and in the more specific roles in a tenant's implementation plan.

Ensuring things happen in the most practical sequence for a tenant is also important. However, when this is not possible good problem solving and reworking the sequence may be necessary, which has happened a number of times in the Hunter project.

Although individual needs and circumstances will drive the planning process, the following is a list of key aspects that are likely to be included in most plans, success will depend on effective implementation. Who will undertake or contribute to different aspects of the plan may vary depending on the tenant's capabilities, availability of family supports and the roles of key organisations providing support services to the tenant.

Supporting tenants to prepare for their move

Supporting tenants develop their confidence and capacity for moving in, paying particular attention to actively incorporate memory, organising and planning strategies within all of the following areas:

- Clarify expectations and identifying what a tenant needs in order to be ready to move in
- Support tenants to be able to maximise their independence and to exercise their rights about choice of their lifestyle in their new home
- Plan for home-based leisure activities or strategies that provide structure in their day to manage potential loneliness
- Encourage tenant to consider 'the first night': this is what it will look like, what will you need?
- Manage anxieties and expectations of both tenants and their family and supporters

Plan for support to be in place immediately when the tenant moves in

- Develop a weekly plan outlining the support and routines required, presented in a way that is easily understood by the tenant (e.g. may require visuals or use of technology)
- Identify and refer/link to local services (e.g. GP, pharmacist, optician, podiatrist, dentist)
- Ensure arrangements are in place for prescriptions/medications and instructions for administration (e.g. webster pack) for first week

Supporting tenants plan for using transport

- Support the tenant to apply for taxi transport subsidy scheme in consultation with GP
- Support the tenant to apply for Companion Card if needed
- Support the tenant to seek out information about local public transport options
- Discuss with NDIA as appropriate inclusion of transport within the tenant's NDIS plan

Household items

- Support tenant to plan household items that will be needed (i.e. Do I have the furniture I need/have I arranged removalists etc? If I do not have the furniture and I do not have the money to purchase, are there options in the community where I can get some financial assistance with this?)
- Support tenant to think about types of furnishings and furniture placement that will enable them to maintain maximum accessibility within the apartment
- Remind tenant to arrange delivery of furniture/equipment at times when someone will be there to accept delivery

Lease

- Tenant meets with property and tenancy manager to discuss the terms of their lease, answer any questions and make arrangements to sign their lease
- Applications for rent assistance and/or bond have been completed where needed

Technology

- Organise training for each tenant and staff in the communication technology for calling staff on-site and for any home automation they have

Utilities

- Support tenant to consider how they will apply for water, gas, electricity, telephone connections in their name. Assistance and support from the tenancy manager is likely to be available for this

Move day

- Ensure supports are in place from day one, arrange additional supports if needed
- Ensure tenant is able to purchase food to stock pantry

Organisational activities to support a successful transition include:

Selecting and training the tenant's direct daily support team

- Recruit staff based on tenant's identified preferences and support needs
- Involve tenant in selection process; this may involve meeting a number of support workers and the tenant choosing support workers who they feel will work well with them
- Support tenants to understand their responsibilities in staff selection and how they might contribute to establishing mutually respectful ongoing relationships with their support team
- Organise training of staff around the specific needs of the tenants they will be supporting
- Begin some support shifts at tenant's pre-move living arrangement, to allow tenant and support staff to build rapport and trust before moving

Detailed assessment by tenant's allied health practitioner

This can include:

- Assessing the tenant's needs for modifications, equipment and technology and liaising with the property owner or their representative in preparation for obtaining quotations
- Identifying any skill development or program required to support the tenant e.g. maintenance of functional capabilities program required by tenant, behavioural support program; cognitive strategies required including organising, planning, problem solving, and memory strategies

Facilitating coordinated supports for tenants in their new home

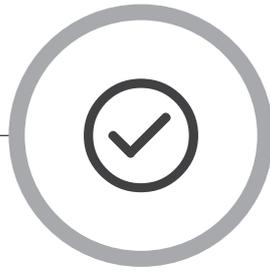
- Establishing processes for ensuring that all key supports being provided to a tenant that are essential to their wellbeing are well coordinated when the tenant moves in
- Ensuring that ongoing processes are in place for communication and coordination between the range of supports a tenant might receive. This includes specialist services such as nursing, allied health and medical

Desired outcome of this stage

The tenant has successfully moved into their new home with all supports working well, any major practical issues associated with life in their new home are resolved, and there are adequate monitoring and review mechanisms in place to cope with the unexpected.

Indicative Timeframe

The length of the implementation phase will be influenced by individual tenant circumstances, but in most instances will take approximately three-six months post-planning phase.



STAGE 5: CONSOLIDATING THE TRANSITION

This final stage involves ensuring that the tenant's move has been successful, that they are well placed following their move and starting to focus on longer-term goals.

Approach

Once the tenant has moved in regular, careful and pro-active monitoring is required for the first few months on a number of aspects to ensure that the tenant has the best chance of sustaining their life in their new home and is able to pursue their longer-term goals. Key aspects include:

- Monitoring that all is going well and that daily routines, equipment, technology and design are all working well for the tenant. Based on experience to date a number of refinements to scheduled support arrangements will be required as will additional short-term support and skill building to maximise the person's ability to live as independently as possible
- Monitoring whether the tenant remains positive about their move or whether they have doubts, frustrations, anxieties or significant practical challenges with daily life
- Supporting the tenant to reflect on the progress they have made and the aspects that they would still like help with to develop their capability to live as independently as possible
- Review whether all needed services and supports that formed part of the tenant's support plan are delivering what is required (this may, for example, include specialist health or behavioural support services)

It is important that any issues or challenges are quickly identified and addressed.

The transition coordinator, with their detailed knowledge of the tenant, their transition plan, their goals and aspirations and their support network is best placed to be responsible for this active monitoring. Regularly checking with the tenant provides reassurance to the tenant that they are being supported as they manage the many new aspects of moving to a new home and community.

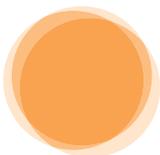
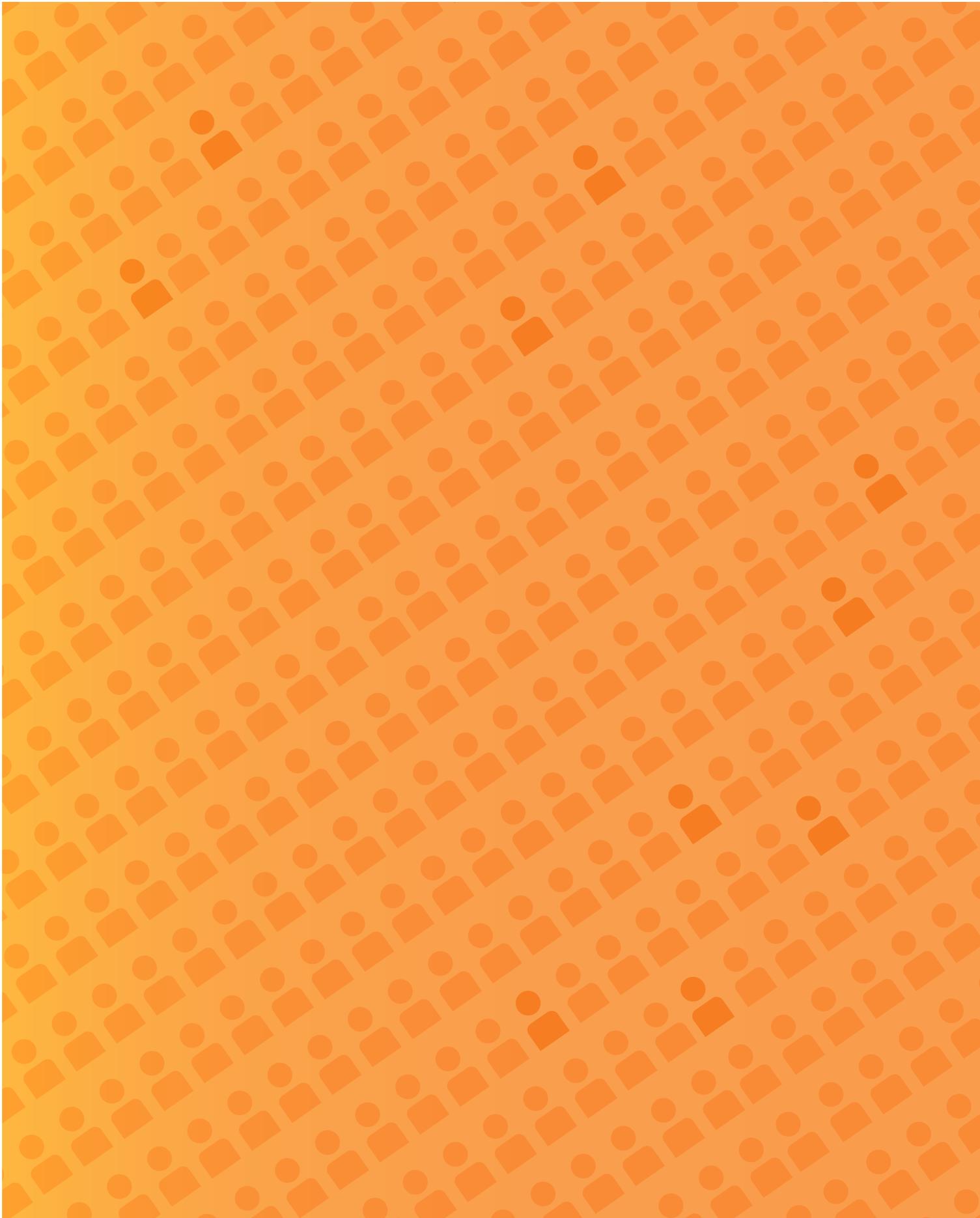
The transition phase should end once it is clear that the tenant has settled in well, support routines are stabilised and that their equipment, technology and the physical design of their unit has been fine-tuned to help them live as independently as possible. Towards the end of this phase a review should be initiated with the tenant's NDIA planner to consider the tenant's ongoing need for support coordination and the nature and objectives of the support coordination. It will be important to put in place timely and effective processes for any handover from the transition coordinator to a new support coordinator.

Desired outcome of this stage

The tenant has successfully settled into their new home and the focus shifts to supporting the tenant to frame their future, long-term goals and to sustain their ability to live independently in their own home.

Indicative timeframe

An average of three-four months but this will vary for individual tenants.



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