

Microboards Webinar Questions from the Attendees

Q: How does a Microboard get started? Are there any written guidelines and resources?

Hunnicut team: The first step is to determine you want a Microboard; then determine the individuals/ the focus person you want to be included and ask them to be a part of it. Have an idea about meeting frequency and any details that you can share to give an overview to invitees. Share a vision of what you want the Board to accomplish in the short term and in perpetuity.

The Georgia Microboard Association has a handbook that is available that can be procured (see website for details: <https://www.gamicroboards.org>). It is a very comprehensive resource.

Rabin team: State Associations will have materials by which they support Microboard development that are specific to their state. Associations often make themselves available to assist people from other states who do not have a State Association.

The Wisconsin Microboard Association works alongside those who are interested in exploring a Microboard. There are other options, such as Limited Liability Corporations or Cooperatives that might be a better choice for some people. Microboards must adhere to Microboard Trademark structure, values and principles. In WI, a Microboard must be *recognized* by the WI Microboard Association as adhering to the Trademark. Microboards are both a provider and vendor agency built around one person and based on person centered practices.

In general, a Microboard starts with Person- Centered Planning, Self-Determination as well as developing and expanding community connections.

Next, gather a team of like-minded people who can assist in the planning and serve on the Person's Microboard Board of Directors.

Resources:

<https://www.velacanada.org/>

<https://www.communityworks.info/articles/microboard.htm>

David: It is possible for an individual or family to develop, incorporate and launch a Microboard on a do-it-yourself basis, but we strongly recommend doing this in collaboration with one's state Microboard Association or a local Microboard development group.

Microboard Associations in British Columbia, Ontario, Illinois, Wisconsin, and elsewhere have developed written guidelines, resources and processes for developing individual Microboards. We are in the process of collecting these guidelines and will make connections with those associations available to the NCAPPS project in the near future.

Q: What does a Microboard consist of? (i.e., title of the members and their roles)

Hunnicut team: Typically, a Microboard will have a President, Vice president, Secretary/ treasurer and Convener. Other roles could include Hospitality Coordinator, Project Coordinator,

Rabin team: Microboards consist of a minimum of three people on the agency Board of Directors (minimum standard set for Incorporation of a Non-Stock, Non-Profit agency). The Person is a member of his/her Microboard. No individual on the Board of Directors can be paid to serve on the Microboard nor be a paid employee of the Person. Best practices suggest including 5-8 members on the Microboard's Board of Directors which often includes the guardian, family, friends and other supportive community members or people with a specific expertise.

Microboard Bylaws must be established which outlines roles such as President, Vice President, Secretary Treasurer and Directors. One member can wear several different hats.

David: Every individual Microboard is registered as a nonprofit corporation in its own respective state. As a registered nonprofit, each Microboard must have a formal Board of Directors. The minimum number of directors is determined by the rules for nonprofit incorporation in each state. This minimum is generally between three and five directors, but ideally, Microboards will elect to have additional directors to ensure strength, continuity, and enhanced community access. For legal purposes, each board must have a named President, Vice-President, and Secretary, and for banking purposes, each board must have a named Treasurer. The President or Vice President may also serve in the named roles of Secretary and/or Treasurer, but this is not a recommended practice.

Q: Where can I find out about my local Microboard associations? If there is none in my state, how can I start it?

Hunnicut team: A Google search for Microboard + Disabilities will usually reveal the topic. (Leaving out the "disability" nomenclature, you will be referred to "electronic circuit boards") Then look down the list for your state or others nearby and access their websites. The language of the websites can give you other ideas about language relative to the topics.

Caveat...Any and all comments regarding money and funding questions are based the state of Georgia and should NOT be generalized to your state. However, the nomenclature is illustrative of topics that may be a part of YOUR states' systems and can be used to get into your lane and language. BEST of Luck in your searching.

Rabin team: You would have to search within your State. It would be wise to have several established Microboards in your State before trying to start a state association. Anyone who wishes to develop a Microboard in a state that does not currently recognize this model would need to:

1. Establish a working relationship with the Vela Microboard Association in British Columbia in order to receive permission to use the Trademark: Microboard. David Wetherow might be resource (or provide other contacts) for assisting people with Microboard development in such states.
2. The State must recognize a Microboard as an agency around one Person that can receive and manage Medicaid funds. Creating the first Microboard and having it recognized by the State would pave the way for an Association to be developed.

David: We are currently assembling a contact list of qualified state-wide Microboard associations and will make that list available shortly. There is also work underway to bring existing and emerging Microboard associations into a ‘virtual’ international learning, teaching, and practice community.

If your state is part of the NCAPPS technical support project, you may want to request some technical assistance / subject matter expertise in the direction of helping a Microboard association form in your state. If you don’t have access to NCAPPS supports, we recommend contacting the Vela Microboard Association at <https://www.velacanada.org/consulting>. Vela has been doing good work in helping associations form world-wide.

Q: Who funds a State Microboard Association? Do the Microboards pay dues? What if you live in a state that doesn't have a Microboard association?

Hunnicut team: The Georgia Microboard Association is funded by the State of Georgia. Christopher’s is funded by Christopher and his income /revenue. We have relatively few expenses (refreshments for meetings, State Incorporation fees (about \$150 I remember). We have a computer and speaker/ microphone unit for Zoom Conferences (Zoom is free to individuals) that link distant folks via computer (total cost about \$750).

None of our Board are expected to contribute “dues /contributions” (clarified at the beginning of asking them to be a member) etc.

If your state hasn’t a Microboard Association contact the State Disability Policy entity (DDC + your state) and ask them if they are aware of a Microboard initiative within you state and ask for contact information. In Georgia our policy entity is the Georgia Council on Developmental Disabilities. I believe they are in place across the nation.

Rabin team: The funding of State Associations varies by state. The first efforts to develop Microboards in Wisconsin were funded by a grant from the WI Department of Health Services, Pathways to Independence, or the Centers for Medicaid and Medicare Services (CMS). The Association was developed after the first Microboards were created and this grant initiative ended. Currently the Association consists of unpaid volunteers, the State has a working relationship with the WI Microboard Association but does not provide ongoing funding to the Association. Some State Associations do receive funding from state-level departments/organizations.

It is up to the individual Microboard Associations whether individual Microboards pay dues/membership. If you live in a state without Microboards, then you want to support establishing individual Microboards first by beginning a conversation about recognizing Microboards with your State Department that manages Medicaid funding.

David: We tend to see three ‘funding’ models in action here:

1. In some instances (British Columbia being the strongest example), states are funding Microboard Associations on a continuing basis. This might be thought of as an ‘infrastructure’ investment in the same way that states, counties and municipalities build roads and highways, so they don’t have to require individual drivers to get out of their cars, build overpasses, and lay asphalt.

2. In some instances, state Developmental Disability Councils or community foundations have funded Microboard Associations through a startup phase, but this should be accompanied by sustaining state commitments over the long run. In our view, it is in the legitimate interest of states to sustain funding – Microboards have the capacity to create enduring person-centered solutions, especially in hard-to-serve areas or when people are facing complex support needs.
3. In other instances, Microboard Associations have been operating solely on the basis of volunteer power (Wisconsin being a current example). This is a noble undertaking, but it definitely limits the capacity for development to a handful of new Microboards each year.

In some states, Microboards may pay a nominal fee for membership, but it is generally only enough to keep the lines of communication open. This is not a sustainable financing model, especially in terms of supporting future developments. We *have* recommended that the states allow a budget line, perhaps 2% of a Microboard's annual service budget, to pay for the organizing, training, and technical support services that can be provided by a secure Microboard association.

Local Development Groups

The Wisconsin Microboard Association is working on a new model, which is to focus the 'state-wide' association in the direction of forming and supporting 'local development enterprises' that help individuals and families create Microboards in smaller, rural or even remote settings. In British Columbia, Vela Microboard Association has done something along this line by staffing regional offices. Other associations are making good use of modern videoconferencing technology to serve remote areas, but Wisconsin is looking at a process for supporting and contracting with independent *affiliates* who are embedded in their local communities. This is an especially interesting prospect for serving culturally or linguistically distinct communities.

Q: How are Microboards funded? What type of funding do you receive from the state? What does the funding pay for?

Hunnicut team: Let's determine what funding may be considered before we determine "how", "where", "for what", "who gets paid." Surely some expenses exist for becoming recognized by the Secretary of State's office. In Georgia that amounts to \$150 first year and \$25 annual renewal. Likely a similar fee will be charged by your jurisdiction. Our Microboard works out of individual's homes/offices so we have no expenses for office space, electricity, phone, administrative support. Other "expense items" (computers, internet, other technology (i.e. Zoom) is funded by Christopher's income from work or gift / contributions by other Board members. A whole different scenario exists if one envisions and establishes a "business model" for the Microboard.

Rabin team: In Wisconsin individual Microboards operate within the Person's Medicaid Budget Allocation to provide approved goods and services. The vehicle that provides funding for a Microboard in Wisconsin is a self-directed program named IRIS (Include, Respect, I Self-Direct). IRIS Independent Consultant Agencies ensure that program eligibility is maintained, that the person is safe and receiving quality services.

A Microboard is both a vendor and provider of services in WI and bills for *approved* Medicaid fundable goods and services to an IRIS Fiscal Agency for reimbursement. Microboards operate within the Person's Medicaid Budget Allocation to provide approved goods and services.

A Microboard must cover administrative costs, outside competencies, services and employee costs (as would any provider agency) within the Person's individual budget.

Yes, in WI the Person has an individual budget based on an annual Functional Screen. In a Self-Directed Long-Term Care Program *what is important to the Person and for the Person* is always at the center.

David: Microboards are designed to apply for, receive, manage and be held accountable for managing state funding for the provision of direct support services in the same way as do other direct service providers. As such, they are in a position to provide paid home and community-based support services, employment services (including customized employment and micro-enterprise development), 'day' services, continuing education, rehabilitation, nursing and other clinical services, and more.

Microboards have full authority as employers-of-record in recruiting, hiring, training and managing direct support staff. They may also contract-out to engage clinical and technical consultants and may purchase financial and other services such as accounting, payroll, HR consultation, employee benefit plans, and so on. Some have even contracted with more conventional provider organizations to purchase assistance in recruiting, training and on-boarding new staff members.

One strongly recommended principle is that the Microboard will never rent or own the home or apartment that the person occupies. Instead, it can provide whatever support the person needs to successfully live in and manage their own home by assisting them to purchase, rent or obtain a cooperative share in their own name. In a similar fashion, the Microboard should never own or control the place of business in which a person works. Instead, Microboards can (and in fact have) supported people to start and run their own micro-enterprises or to be successful in supported or customized employment in the larger community.

In a very few instances, an individual Microboard has decided to sub-contract with a more conventional provider agency and have that agency provide the direct supports. However, since the Microboard is still in control of this purchase-of-service arrangement, it retains the power to cancel the contract with sufficient notice and either bring the work inside or contract with another provider.

Q: Is it the person in center who is the recipient of the funding and in control?

David: When someone is using a Microboard to assist them in managing their direct supports, the Microboard corporation receives and manages the funding. The corporation exercises overall control and provides ultimate accountability. That said, the Microboard is uniquely organized for the support of the person at the center, so it follows the principles of person-centered planning and practice: the person is a full, valued and respected member of the Board of Directors, and the principle of balancing what is 'important-to' and what is 'important-for' the person is central to its operation.

One aim of Microboard development is for the person to gain as much direct control over the day-to-day direction and performance of their personal assistant(s) as possible.

Q: How do you get states to participate in Microboards? Will this approach cost more money?

Hunnicut team: I would suggest that the Microboard model would NOT cost more money if the Microboards are functioning as designed.

Rabin team: Microboards don't start with the State they start with the Person. The States are a funding source. Microboards are cost effective and efficient because they adapt quickly to changes and needs of the Person. This does not cost more money because we operate within the Person's Budget Allocation. A number of states have recognized Microboards as a legitimate provider agency which can serve as an example for other states.

David: Ultimately, states decide to include the Microboard model because they conclude that it is their interest to do so. As described in detail in the webinar, Microboards have a number of 'baked-in' features that keep them person-centered, adaptive, accountable, and sustainable for a lifetime. We designed the development process in a way that allows states to qualify Microboards in their normal course of business, using existing mechanisms for approving them as service providers, budgeting, contracting and conducting typical quality assurance measures.

In one state, when an emerging Microboard association was planning to study the model for a year and then write a 'white paper' proposal, we said, "It's simpler than this. Get the first Microboard incorporated and up and running in ninety days (we'll help you do that). This will teach you what you need to know about the development process, and it will allow the state to learn what *it* needs to know about approving, contracting with, and monitoring this new kind of provider. Do it in a way that doesn't require the state to change legislation, regulations, or any of their usual approval processes. Once you have done this together, there's no longer a question of whether this 'can' happen – it becomes a question of how many and how fast."

Q: Are Microboard members usually paid? I would be very interested to see a map of how money flows for Microboard and other supports. ... How much are the support people paid per hour? Do Microboards also offer other typical company perks like health insurance, 401k, etc.? I suspect that Microboards can pour more money into the employees?

Rabin team: No member of the Microboard Board of Directors may be paid though the operating funds of the Microboard. Microboards pay for approved goods and services on the Person's budget and are the employer of record, paying taxes, workman's compensation and unemployment insurance. Microboards are cost efficient, as families and others often put in many natural support hours to keep the Microboard running. Each Microboard must determine staff pay rates and benefits in the same manner that other provider agencies do. Microboards often take advantage of on line and in person trainings that are relevant to the Person.

David: Members of the Microboard board of directors are never paid for their participation and service. Certain specific transportation or accommodations costs may be covered, but board membership *per se* is a strictly voluntary contribution. This also means that paid members of the person's direct support team, including paid family members, are not permitted to serve on the Microboard board of directors.

Staff wage rates and benefits are generally set in the budgeting and contracting process with the state. Microboards are often in a position to offer somewhat higher wage rates due to having lower administrative overheads and no profit factor. In some localities, Microboards have been successful in establishing affordable cooperative or group rates for health insurance, retirement plans and other typical company benefits. That being said, Microboards face the same funding challenges as do other more conventional provider agencies, and several Microboard associations are currently working with coalitions of providers to advocate for more competitive rates for their workers.

Q: Are the Microboards considered as nonprofit organizations? If so, how does the nonprofit status get established, and receive funding from states? Do you have to apply for the 501c3 status? Does the Microboard have to file annually with the IRS? Or with a 990 report?

Hunnicut team: No, the Microboard is typically NOT a not for profit organization. Some have become 501 (c) 3 organizations but that is a separate matter with the IRS and the Federal system and requires an additional layer of administrative and legal steps.

Traditionally funding for non-profit organizations comes from tax deductible gifts and donations to the organization from individuals and organizations. A Nonprofit gets established by applying to the IRS for that status, and when approved, grants those privileges and is governed by those laws. Funding from states is generally not received. Yes, an organization must apply for 501 (c) 3 status.

Rabin team: Microboards are Non-Stock, Non-Profit Corporations and are incorporated as a Chapter 181. All of the reporting and tax requirements must be adhered to. Microboards must be recognized, as any other provider agency is recognized, by individual states to receive funding. Since they support one person, they are not eligible to be a 501(c)(3).

David: Microboards are state-registered nonprofits, but they are not charities. Because they are defined in their articles of incorporation as serving only one person, they are not eligible to be registered under the 501c3 tax law. They may coordinate or cooperate with other registered charities, but they cannot write tax-deductible receipts for financial contributions. Registration of a nonprofit corporation is a relatively speedy, straightforward and inexpensive process in most or all states. Upon dissolution, individual Microboards must transfer any remaining assets to nonprofits or charities that are serving similar purposes.

Beyond these legal considerations, there are two important features of the nonprofit Microboard corporations that bear mentioning:

- (1) Our working principle is that the person who is being supported should be a named Director of the Microboard corporation and should receive whatever supports he or she might need to express their opinions, vision, directions and concerns, and,

(2) Each Microboard will ideally include invited members of the larger community who have an authentic relationship with the person being supported, who will introduce and engage members of their own personal networks, and who will open doors to the community spaces in which they have standing and influence.

Q: *How are the Microboard model and self-directed services similar and different?*

Hunnicut team: With a self-directed model, a participant may choose their provider without using an agency source for support. The support person must have various credentials and training to qualify for providing services but not the Agency oversight and expense.

Rabin team: Microboards are the epitome of Self –Direction. The difference is that there is a structure in place to ensure continuity, the Microboard is the employer of record and the Microboard has control of goods and services and who comes across the Person’s thresh hold.

David: ‘Self-Directed Support Corporations’ may be similar to Microboards, but there is no guarantee that they will be following the same principles and practices. Years ago, the Vela Microboard Association trademarked the name Microboard™ in order to protect the ‘brand’. Vela retains the ability to enforce the trademarked name if a self-proclaimed ‘Microboard’ or ‘Microboard association’ is not adhering to those principles.

Q: *Do any Microboards exist that are made up of a coalition of two or more circles of support?*

Hunnicut team: Typically, NOT, as each Microboard is established for the sake of ONE individual.

Rabin team: A Microboard exists for only one person. Circles of Support may be connected to the Microboard as an additional source of support/resources (paid staff and unpaid family/friends and community members).

There are few exceptions to serving more than one person. An example of this might be where the interests of one person are highly interconnected to the interests of another, e.g., a Microboard that serves siblings or a married couple.

David: There are a handful of instances in which individual Microboards end up serving more than one person, and these are very tightly defined. One is when two people who are married or in a committed relationship are supported as a couple. The other is when two or more siblings are being supported in their family home. In the first instance, the Microboard is strongly encouraged to plan ahead for the possibility that a couple may separate, or that their individual support interests may diverge to the degree that it would be in each person’s best interest that the Microboard would split into two separate Microboards. In the second instance, the Microboard is strongly encouraged to plan ahead for the possibility that the siblings’ support interests may diverge to the point where it would be in both their interests for the Microboard to split into two separate Microboards.

In instances where two unrelated individuals are sharing a home or a staffing arrangement, we insist that each person have his or her own Microboard. This makes it possible for the two to separate at some future date, having confidence that their individual Microboards and their access to support services will remain intact.

Q: I can see a Microboard working while parents are still around, but how do you guarantee that the situation continues without parental involvement/input?

Hunnicut team: Establish the perpetuity of the board to last beyond the focus person's life by having members who are younger than the focus person and / or establish legal documents that charge the board with decision up to and including one's life and passing.

Rabin team: One of the main functions of a Microboard is to provide continuity of care for the Person once the parents pass on or for any reason are not able to be a primary support in the life of their adult son/daughter. The Person should feel no change in their lives. This is why the Board of Directors must include other family/friends and community members who know the Person and carry 'history' as well as share their 'standing' in the community with the Person.

David: This question is relevant for both Microboards *and* support circles like the Star Raft. In both cases, we establish from the outset that one of the goals of the enterprise is to work in the direction of continuity and lifelong advocacy on behalf of the person at the center. This leads to two sustained courses of action right from the outset:

First, we encourage Microboards and Star Raft circles to keep inviting and including new members. As one of our trusted advisors says, "Don't wait until someone is ready to leave. Keep working on a flow of new membership in the group; it's a primary source of creativity and energy."

Secondly, we let people know that they are entirely free leave when they want or need to leave, but that when they're thinking about leaving, we need their help in preparing their replacement. This is one of the reasons that we think of the Microboard as part of a larger circle so there are always people in the wings who know the story, have a solid working knowledge of the Microboard, and have been thinking about stepping into a more formal role when it's their turn. Some associations suggest that we ask people to commit to a limited (e.g. two-year) term on the Microboard, allowing for people to renew those commitments as their circumstances allow.

Q: Do Microboards work with case managers to write plans for people? In my state we have service and support administrators that write plans and coordinate funds. I am curious if a Microboard system could work in conjunction with case managers, or if that is contrary to the spirit of a Microboard.

Hunnicut team: I believe that Support coordinators (in Georgia) can benefit from seeing the workings of the Microboard as it relates to the participants Plan of Care (individualize service plan, etc.) If they have participated in the PATH / MAP / STAR RAFT plan which becomes the foundation to the ISP, they will be more likely to write a plan and support it.

Rabin team: Microboards write their own plans, just like others in Wisconsin who participate in the WI Medicaid funded Self-Directed Long-Term Care Program - IRIS. These plans must include state approved paid Medicaid supports. In WI, Independent Consultant Agencies (IRIS program consultants) have a role to support and ensure that the individual is safe and receiving appropriate goods/services.

David: This is a great question, and it leads to a consideration of the relationship between *person-centered planning* and *service planning*. Based on three decades of field experience with both forms, we strongly suggest that someone's person-centered plan be conducted independently and *in advance* of the service plan. This makes it possible to *derive* a service plan that is aligned with the person-centered plan, but it also keeps the person-centered plan intact, supporting an understanding that the service plan is only one of the driving forces in the person's life, and that it supports and complements the contributions of family, friends and community partners. This keeps the person-centered plan from being limited to considerations of what the service system is prepared to commit to.

There may be some states in which there is an expectation or a requirement that the person-centered plan and the service plan are to be conducted at the same time or in the same planning session. In this case we strongly recommend that the first item on the planning agenda is to conduct the person-centered plan, capturing the broad vision of the person and their trusted allies, and only then will the team derive a service plan in the light of that broader vision. Both of these options have implications about (a) who will be involved in the planning process, and (b) who will facilitate different elements of the plan.

The person absolutely needs to be present at the plan, with whatever supports he or she needs to contribute their view. Family members and trusted community partners need to be in the planning session. This means that there will need to be a significant investment in preparing the person, the family and community partners for participation in the planning event.

We recommend that the person-centered portion of the plan be facilitated by someone other than the service manager or service provider, which allows the manager or provider to offer valuable perspectives on history, challenges and opportunities, but not be worried that opening up lines of possibility will be interpreted as a commitment on the part of the state or the service provider.

We have written about this in an informal paper about managing and resolving potential conflicts of interest in person-centered planning. It says in part:

We acknowledge that trusted people [including case managers] who provide direct support services can indeed make authentic, creative and respectful contributions to the process. In many cases, these people have authentic caring relationships with the person and the family. They may have valuable perspectives on history, on challenges and opportunities, and on specialized tools and skills that can further the person's journey. But the [person-centered planning] process can also bring something to *them*, [as they see] how much community commitment and capacity is available to and directed towards the person at the center.

They may hear about and see aspects of the person's identity, capacity and role that only shows up in the context of other relationships. They may realize that there are tools and skills that they can offer in a context that is richer in opportunity, commitment and support than they had originally

envisioned. It has been our experience that when this happens the 'service' person can feel [freer] to offer supports because they no longer see themselves as being the sole source of support. They can let go of [the worry] that opening a new thread of possibility will somehow create an explicit or implicit obligation that they cannot fill due to the limitations of their formal role or the context in which they work.

As we speak about this, we begin to identify the 'service' person as a valued and honored member of the circle of thinkers, creators and allies. The 'service' person attends the person-centered plan *at the invitation* of the person at the center and his or her trusted allies. Also, the person at the center has the ability to declare what s/he wants to appear on his/her Person-Centered Plan and what s/he might receive with appreciation but wants *left off* of [the person-centered portion of his/her plan].

Q: What happens when the Microboard starts to "dissolve" due to circumstances beyond its control?

Hunnicut team: Realize that there is a need for continually seeking interested and concerned citizens, so you don't have wholesale abandonment of the initiative. As you recruit individuals from the beginning, stay the course and repeat. As the needs of the participant change there may be a need to select members who have skills specific to the evolving situation.

Rabin team: If a Microboard needs to dissolve then it follows legal and accounting dissolution procedures, just like any other agency.

David: From the outset, Microboard associations are in a position to help a Microboard that is in difficulty to rebuild, recover, or even dissolve if need be, while assisting the person to transition to another service solution.

In the event that the person at the center passes away, or the person and their allies choose a different service option, the individual Microboard will dissolve, and according to state nonprofit regulations, it must transfer any remaining assets to another nonprofit or charity that is serving similar purposes.

Q: Has the Microboard model been used under the Managed Care system becoming prominent in the Health and Human Services system?

Rabin team: We have not seen Microboards under the traditional Managed Care Model in WI. It would be difficult because the Managed Care Organization controls the funding.

David: We will get back to you on this as we poll Microboard associations across the country. In theory, there should be no obstacle because Managed Care systems are in the same position as the state in their capacity to contract with qualified providers for direct services.

Q: *Have Microboards been established for people who have serious mental illness? How about the elderly? People with brain injury? Any resources and lessons you could share about the transferability of the Microboard model?*

Hunnicut team: Yes, individuals with these challenges ARE being served by Microboards. It is incumbent to identify members who have knowledge or experiences that inform decision making relative to the individual being supported and the needs of those supports.

Rabin team: Microboards would be an excellent fit for those individuals if the Microboard is able to control the Person's Budget!

David: We believe that they have done so, but we will need to poll Microboard associations to confirm this. There is, in principle and in practice, no obstacle to the Microboard model applying adaptively to any diagnosis, 'level of severity' or complexity, age or other status of the person at the center. We know of Microboards that serve individual people with a very wide range of conditions and challenges, including major communication, health and 'behavioral' challenges. One of the strengths of the Microboard model is that it is literally crafted to fit the needs and interests of one individual person, so we are not looking at a 'program' where there may or may not be a 'fit' for an individual seeking entry, or a continuing 'fit' as the person's needs and interests change over time.

Q: *Is this Microboard model financially feasible for a lower income person/community? What about for those who do not have sufficient social support?*

Hunnicut team: Yes, individuals with these challenges ARE being served by Microboards. It is incumbent to identify members who have knowledge or experiences that inform decision making relative to the individual being supported and the needs of those supports.

Rabin team: A person interested in establishing a Microboard will have some outlay of funds to get started. There is a lag in reimbursement such that operating funds are needed which is usually a loan from the family. A doable first step would be to work on Person Centered Planning and develop Circles of Support around the Person. These processes would offer a way to bring others into the Person's life but are not established agencies. As Microboard Associations grow in a state, they might be able to assist with or identify start-up funding for some families.

David: The financial feasibility question is, in a sense the same question that exists in any other service equation: (a) are the service finances adequate to meet the day-to-day support needs of the person, and (b) is the underpinning development entity (the Microboard association) adequately financed to craft a satisfactory solution and to continue to support it over time? Microboards have been successfully formed to meet the needs of people who have no family (a not infrequent occurrence when people are returning to the community from decades in an institution), whose families are absent, unavailable, or wish to remain uninvolved, or whose families lack the capacity to directly manage a complex support solution.

When we created the first Microboard in Manitoba, we formed it by inviting people who *did* have the interest, experience and capacity to effectively manage a complex set of support needs. We *built*

the social support along with the service support, and the collaboration between a flexible, creative case manager, a skilled and adaptive staff, and dedicated community partners created what turned out to be a life that was rich in relationships, opportunity, and valued, celebrated social roles.

One financial challenge that has been a sticking point for many individual Microboards has to do with the need for 'bridge financing' between the time when services begin, when they can be billed, and when receivables are finally paid out to the Microboard. Conventional provider agencies are more likely to be able to bridge the service-billing-payables gap, whereas individual Microboards are likely to need some form of advance financing. All of this can be worked out with the state, but it's something that needs to be attended to.

Q: Could you speak to Microboard as a tool for future planning (e.g., when parents can no longer support their child with disability)? How about Individualized Education Program (IEP)? How could the Microboard model be used for developing IEP?

Rabin team: Microboards are an agency with a Board of Directors who are committed to the needs, positive life experiences and outcomes of a Person. This is accomplished through supported self-direction and responsible management. A Microboard is intended to remain in place for the life time of the Person. Directors may serve terms of long standing or shorter terms (as established with Bylaws). Microboards are not a futures planning model, although they make use of futures planning models to ensure the Persons preferences and goals are at the center of the work of their Microboard.

Futures planning models such as PATH and MAP are powerful tools for IEP/Transition Plan development as they refocus the IEP team to:

1. Imagine/dream, with the Person, about what is the best future for them based on their interests, strengths and personal goals.
2. Identify existing and needed resources that will support concrete steps to build that future.
3. Write an IEP/Transition Plan that reflects concrete steps/resources toward building this positive future.

David: Hopefully, many of the responses above have already addressed that question. The Microboard is *fundamentally* based on starting with and continually re-visiting and renewing, one's person-centered plan. Numerous Microboards serve school-age children, and their person-centered plans can readily be crafted or incorporated into IEPs. Many Microboards are now serving seniors who live with disabilities, and were established at a time when their parents were struggling with the question, "Who will be here to look after my son or daughter after I'm gone?"