



Key Elements of a Good Brokerage Plan (ISP Action Plan and Goals Survey) *

- ✓ Clearly understandable by all participants and can be understood by third parties not directly involved.
- ✓ Encompasses the values of productivity, integration, and independence.
- ✓ Based upon up to date and accurate information gathered from key informants.
- ✓ Supports the individual's choices while respecting the perspective of guardians and family members.
- ✓ Includes the larger picture of future dreams and addresses specific steps for day-to-day actions in the coming year.
- ✓ Balances health, safety and quality of life issues.
- ✓ Assures that services paid for through the plan are related to the disability and strengthen a customer's participation in the broader community.
- ✓ Has a combination for formal and informal supports and uses both generic and dedicated resources.
- ✓ Meets Oregon Administrative Rules, SPD policies and Medicaid regulations.

* Assai and Associates, Inc.-11/05/04