

## **MS- #01 Functional Independence**

### **PURPOSE:**

Surrey's Functional Independence (FI) Policy outlines the management practices that Surrey has in place for maintaining our centers in a manner that ensures the health and safety of all of its members and volunteers. Our goal is to ensure the safety, well-being and enjoyment of all of our members and volunteers, maintaining centers that are welcoming and inclusive spaces for all. Surrey is not a licensed adult day care and as such, members and volunteers must demonstrate FI to participate in activities at each of our centers.

### **POLICY:**

Surrey Services operates its centers with a high regard for ensuring the well-being and enjoyment of all of our members and volunteers. When someone joins Surrey, there is an understanding that the individual is functionally independent (FI). This includes, but is not limited to:

- having the overall ability to complete their own membership or volunteer application
- having the cognitive focus, memory and reasoning to establish and maintain relationships
- having the cognitive focus, memory and reasoning to participate in an activity or to complete a task
- the ability to safely move throughout the building without needing assistance from another person, including entering and exiting the building; or,
- if they use a cane, walker or wheelchair, move independently, and get up and sit down without rocking, and consistently using their device
- the ability to toilet themselves without assistance
- the ability to follow basic hygiene rules such as handwashing after using the bathroom, regular bathing, recognizing if they have soiled themselves, etc.
- the cognitive ability to know where they are and remembering previous visits to Surrey, knowing where different programs are located within the building
- recognizing the need to stay inside the building and not becoming disoriented and wandering off
- not becoming combative and showing signs of impulsivity or anger when they do not want to participate in programming
- having the overall ability to advocate for their personal needs as necessary

Functional Independence is imperative because Surrey does not have the capacity to monitor members and volunteers one-on-one or supervise them individually. Members and volunteers are

evaluated on these measures of FI with the main concerns being their safety and well-being, as well as the safety and well-being of high functioning members who are around them.

**PROCEDURE:**

***Initial Determination of Functional Independence***

When a potential member or volunteer inquires about Surrey, they are given a tour of the facility by a member of the staff. This meeting is important because it gives the staff member the initial chance to get to know the member or volunteer and potentially recognize any issues that might interfere with FI. If a member or volunteer joins Surrey using the on-line application, we request that they schedule a meeting with Member Services, the Volunteer Coordinator or the Center Director on their first visit to the center for this same reason. If there are immediate concerns, the staff member will have a discussion with the potential member or volunteer, and/or a family member if available, and discuss what the concerns are as well as potentially recommending other service organizations that might be a better fit for that individual.

***Changes in Functional Independence***

Surrey also recognizes that changes in FI frequently occur over time. These changes may be a person's physical ability, hygiene practices or cognitive abilities. Examples of these changes may be such things as:

- Wandering away from the building
- Causing disruptions in class
- Displaying unsafe behaviors in the dining rooms
- Outbursts of profanity
- Unnoticed or recurring soiling of clothes
- Depending on others for support while walking or moving around the center
- Falling
- Episodes of confusion as to why they are in the building
- Routinely forgetting directions
- Poor personal hygiene
- Inability to feed themselves
- Withdrawing from social interactions

When episodes such as these are noticed, a member of the Member Services team or the Center Director will have a discussion with the member or volunteer and document the discussion for their records. Surrey Incident Reports will be used for documentation to gather consistent information across centers and episodes. If there are repeated episodes, there will be additional discussions. At this stage, or at any stage when there is a safety concern, the Member Services team or Center Director will attempt to bring the member's family in for a discussion as well.

### ***Change in Surrey Status***

One option that may be considered is that a family member or aide bring the member to Surrey with an understanding that the family member or aide will be present with the member at all times while they are in the center. This option is suitable as long as the member can maintain a level of FI with the assistance of their family member or aide. *(If a family member or aide does accompany a member while they are at Surrey, there is an understanding that they will comply with the Center policies and procedures while on-site.)*

Should a family member disagree with Surrey's concerns, they are welcome to schedule a cognitive and physical assessment with a Surrey RN, and other members of the Surrey team with expertise in assessment, so that the best options for the member can be discussed based on a formal evaluation.

If it is determined that the member or volunteer is no longer suitable for center-based activities at Surrey, with or without an aide, or based on a cognitive and physical assessment, the Resource Navigator or Center Director is available to provide the member, volunteer or the family with information about resources that might be more appropriate.

### ***Cessation of Membership***

If cognitive or physical decline, or personal hygiene issues, progress to a point where safety becomes a concern, even with an aide or family member present, Surrey reserves the right to discontinue the participation of the member or volunteer in center-based activities. Surrey remains committed to every member with home-based programs and services.

This is not a decision that Surrey takes lightly. This decision is made to ensure the safety and dignity of the member or volunteer and the well-being of the other members, volunteers and staff. We understand that these decisions can be difficult and we are committed to handling each situation with compassion, professionalism and sensitivity.

***Appeal Process***

The Center Director, in conjunction with their team at each location, is responsible for determining the eligibility of members and volunteers. If the Center Director determines a member to be ineligible for the site and the member disagrees with this decision, the following process is used to appeal the Director's decision:

- The Director meets with the member and reviews how ineligibility was determined. This determination process, eligibility decision and the outcome of the meeting are written up by the Director, using the Incident Report Form, and sent to the CEO.
- If the determination of ineligibility continues to be disputed, the member can meet with Surrey's CEO to discuss the determination of eligibility.
- If the determination of eligibility continues to be disputed, the member will be referred to the appropriate County Department of Aging.