

BIM SUPPORTIVE LIVING LLC

Agency Director - Jamelle Simon-Wallace

Supportive Living Services, 618 Marathon Drive, Oakley, CA 94561,

Family and Conservator Communications Best Practices

Policy Memorandum —Confidential

TO:	Families and Conservators of BIM Supportive Living Services Clients
FROM:	Jamelle Wallace, Agency Director, BIM Supportive Living LLC
DATE:	July 1, 2020
RE:	Protocol for Communications with Staff — Expectations, Client Care, and Organizational Responsibilities
DOCUMENT TYPE:	Policy Memorandum

BIM Supportive Living Services recognizes and values the essential role that families and conservators play in the lives of the individuals we are privileged to serve. Your knowledge of, dedication to, and advocacy on behalf of your loved one are vital complements to the professional support our team provides, and we are committed to building a collaborative relationship that honors that shared commitment.

This memorandum has been prepared to provide clear, transparent guidance on how communications between families and conservators and BIM Supportive Living Services staff should be conducted. The protocols outlined herein are intended to ensure the highest quality of care for each client, uphold mutual respect between all

parties, maintain appropriate professional boundaries, and foster a working relationship grounded in openness, accountability, and trust. These guidelines are designed to protect the client first and foremost, to support our staff in performing their duties effectively and with dignity, and to promote a constructive and lasting partnership between BIM Supportive Living LLC and the families and conservators it works alongside.

Section 1: Purpose and Scope

This memorandum applies to all families, conservators, and authorized representatives of individuals receiving Supportive Living Services through BIM Supportive Living LLC. The protocols herein govern the manner, form, and appropriate channels through which communications between those parties and BIM staff are to be conducted.

BIM Supportive Living LLC is committed to open, respectful, and professional communication with all individuals involved in a client's care and life. Establishing clear expectations regarding communication practices is not intended to create barriers between families and the agency; rather, it is a proactive measure that supports the well-being, safety, and measurable progress of each client we serve. Adherence to the guidelines set forth in this document by all parties ensures that our staff can focus their full attention and professional capacity on the individuals in their care, and that families and conservators can trust that their input is received and addressed through appropriate channels.

Section 2: Guidelines for Communicating with Staff

2a. Appropriate Channels of Communication

To ensure that client care is coordinated effectively and that all communications are properly received, documented, and acted upon, BIM Supportive Living Services has established designated channels for family and conservator communications. All inquiries, concerns, updates, or requests related to a client's care, daily activities, or

support needs should be directed through the designated Service Coordinator or Program Supervisor — not through individual direct support staff. This structure ensures that communications are handled by personnel who have the authority, access, and context necessary to respond appropriately.

Families and conservators are encouraged to contact the agency's administrative office to schedule calls, care conferences, or in-person meetings. This allows BIM to allocate appropriate time, ensure the relevant personnel are present, and document the discussion accurately in the client's record. Direct contact with direct support staff during active support hours should be reserved for urgent matters pertaining to the client's immediate safety or well-being. Non-urgent communications received through informal channels may not receive a timely or complete response and may not be documented in the client's official file.

2b. Tone and Conduct

All communications between families and conservators and BIM Supportive Living Services staff — whether conducted in person, by telephone, by electronic means, or in writing — are expected to be conducted with mutual respect and professionalism. BIM Supportive Living LLC will not tolerate verbal abuse, intimidation, threats, or demeaning, derogatory, or harassing behavior directed toward any member of its staff by families, conservators, or any other third parties. Such conduct may result in the agency initiating a formal review and, where warranted, adjusting the terms of service engagement in accordance with applicable regulations and agreements.

BIM holds its staff to the same professional standard. All BIM personnel are expected to engage with families and conservators in a manner that is courteous, clear, solution-focused, and respectful at all times. Concerns about the conduct of any BIM staff member should be directed to the Agency Director as outlined in Section 6 of this memorandum.

2c. Documentation of Communications

BIM Supportive Living Services maintains thorough records in support of each client's health, safety, and service delivery. Accordingly, significant communications related to client care, behavioral concerns, service adjustments, or family and conservator input will be documented in the client's official file. This documentation practice

supports continuity of care, ensures accountability, and provides an accurate record in the event of regulatory review or service disputes.

Families and conservators are strongly encouraged to communicate in writing — by email or formal written correspondence — whenever possible. Written communications facilitate accurate record-keeping, reduce the potential for miscommunication, and ensure that action items receive proper follow-through. When telephone conversations occur on significant matters, BIM staff may follow up with a written summary for the client's file.

Section 3: Conversations Regarding Client Care and Expectations

3a. Care-Related Conversations

BIM Supportive Living Services welcomes and encourages families and conservators to share their observations, concerns, and updates regarding their loved one's health, behavioral patterns, preferences, and overall progress. Your firsthand knowledge of the client is invaluable and is considered an important component of person-centered service planning. BIM staff are trained to receive and incorporate such information respectfully and in accordance with the client's authorized service plan.

Care-related conversations should be scheduled in advance with the Program Supervisor or Service Coordinator to ensure that adequate time is allocated, the appropriate personnel are available, and the discussion can be properly documented.

Families and conservators should not instruct, direct, or provide task-specific guidance to individual direct support staff regarding the execution of care duties, behavioral intervention strategies, or daily routines. The organization and execution of these responsibilities are coordinated through the client's Individual Support Plan (ISP) and BIM's internal agency protocols. Informal redirection of staff duties by outside parties undermines care consistency and may create confusion or risk for the client.

3b. Setting Expectations

Expectations for the nature, scope, and delivery of client support are formally established through the ISP process. This process is conducted in collaboration with the client, the Regional Center Service Coordinator, the family or conservator (where applicable and appropriate), and BIM Supportive Living Services. The ISP represents the authoritative framework governing the support provided to each client, and all service delivery activities are aligned with its provisions.

Any requested changes to a client's support plan, daily schedule, goals, or overall service approach must be raised through the appropriate Regional Center and BIM agency channels. Informal requests communicated directly to direct support staff do not constitute authorized changes to the service plan and cannot be implemented outside of the established ISP revision process. Families and conservators are always welcome to share input, observations, and preferences, and BIM will make every reasonable effort to incorporate those preferences within the scope of the client's authorized service plan and applicable regulations.

3c. General Comments and Feedback

BIM Supportive Living Services is committed to the continuous improvement of its services and genuinely values constructive input from the families and conservators of its clients. Comments, commendations, suggestions, or concerns regarding the overall quality of services or the performance of any individual staff member should be directed to the Agency Director or House Manager. This ensures that feedback is received by personnel with the authority and context to respond appropriately.

BIM will acknowledge all formal written feedback within five (5) business days of receipt and will communicate the outcome of any review or action taken, to the extent permitted by staff confidentiality and applicable law.

Section 4: Staffing — Organizational Responsibility

All decisions relating to the staffing of BIM Supportive Living Services — including but not limited to the hiring, assignment, scheduling, training, supervision, performance management, disciplinary action, and separation of personnel — are the sole and

exclusive responsibility of BIM Supportive Living LLC in its capacity as the employing organization. These responsibilities are vested in BIM's leadership and human resources function and are not subject to direction or control by families, conservators, or any other external parties.

BIM recognizes that families and conservators may develop informed observations regarding how specific staff members interact with their loved one, and those observations are considered a legitimate and valued form of input. **Families and conservators are welcome to share preferences or concerns about staff compatibility through the appropriate channels. However, such preferences do not constitute staffing directives and do not obligate BIM to take any specific personnel action. All staffing concerns raised by families or conservators will be received, reviewed, and addressed by BIM leadership in a timely and professional manner, with the best interests of the client at the center of any organizational decision.**

Families and conservators should not communicate directly with BIM staff regarding scheduling, staffing assignments, staff-to-client ratios, or any other personnel matter. Such communications are not appropriate, may place staff in a professionally untenable position, and may interfere with the effective management of services. All staffing-related concerns must be directed in writing to the Agency Director.

BIM Supportive Living LLC expressly reserves the right to make all staffing decisions independently and in accordance with applicable employment law, the regulations of the California Department of Developmental Services (DDS), and the agency's internal human resources policies and procedures.

Section 5: Non-Discrimination Policy

BIM Supportive Living LLC is an equal opportunity employer and is firmly committed to building a diverse, inclusive, and highly qualified workforce that reflects the communities it serves. BIM does not discriminate in its

hiring, assignment, or any other employment practice on the basis of race, color, national origin, gender, gender identity or expression, sexual orientation, religion, age, disability, or any other characteristic protected by applicable federal or California state law. This commitment is fundamental to the agency's values and is non-negotiable.

BIM Supportive Living LLC actively and intentionally welcomes qualified individuals from all backgrounds who are committed to providing compassionate, person-centered, and skilled support to individuals with developmental disabilities. The strength of our workforce reflects the depth and breadth of the talent we are privileged to recruit and retain.

All BIM staff members are expected to consistently demonstrate the following core competencies in their work with clients, families, and the broader community:

1. **Sound judgment and professional conduct** in all client-facing and community interactions, at all times and in all settings.
2. **The ability to recognize and respond to behavioral triggers** with calm, consistent, and evidence-based de-escalation techniques that prioritize the safety and dignity of the client.
3. **The ability to model and reinforce strategies** that reduce self-injurious behavior and physical aggression toward others, in alignment with the client's ISP and behavioral support plan.
4. **Skillful, trauma-informed management** of client trigger responses in family, residential, and community settings, with sensitivity to each client's individual history and needs.
5. **A genuine and sustained commitment** to the dignity, independence, and quality of life of individuals with developmental disabilities, as demonstrated through daily practice and professional conduct.

Families and conservators are respectfully asked to honor BIM's non-discrimination hiring and employment practices. All staffing decisions made by BIM Supportive Living LLC are based upon the qualifications, training, availability, and assessed compatibility of staff with the needs and preferences of each client — and never upon

the personal characteristics of any individual. Requests that appear to be inconsistent with BIM's non-discrimination policy will not be honored and will be addressed directly by the Agency Director.

Section 6: Reporting Concerns

BIM Supportive Living Services takes all concerns regarding the conduct, performance, or behavior of its staff seriously and is committed to a prompt, thorough, and impartial response to any legitimate concern raised by a family member or conservator.

If a family member or conservator has a concern about the conduct, performance, or behavior of any BIM staff member, they are asked to submit that concern in writing to the Agency Director at BIM Supportive Living LLC. Written submission ensures that the concern is formally received, accurately documented, and routed to the appropriate personnel for review. All concerns submitted through this channel will be investigated in accordance with BIM's internal grievance and personnel review procedures, and the reporting party will be advised of the outcome to the extent permitted by applicable law and staff confidentiality obligations.

Emergency Protocol — Immediate Safety Situations:

In any situation involving the immediate safety or welfare of a client, families and conservators should take the following steps, in order:

1. Contact **911** immediately.
2. Notify BIM's **on-call supervisor**.
3. Contact the **Regional Center of the East Bay**.

BIM Supportive Living LLC is committed to transparency in its handling of and response to all legitimate concerns, within the bounds of applicable staff confidentiality protections and state and federal law. The agency will not retaliate against any family member or conservator for submitting a concern in good faith.

Section 7: Acknowledgement and Agreement

This policy memorandum is provided to all families and conservators of BIM Supportive Living Services clients upon initiation of services and is subject to annual review. It may also be revised at any time in response to significant changes in agency policy, applicable regulations, or operational requirements. Families and conservators will be notified of material revisions in a timely manner.

By continuing to engage with BIM Supportive Living Services following receipt of this memorandum, families and conservators acknowledge that they have read and understood its contents and agree to adhere to the communication guidelines, conduct expectations, and organizational protocols outlined herein. This memorandum does not alter or supersede any rights or responsibilities established under the client's Individual Support Plan, Regional Center service agreement, or applicable state and federal law.

On behalf of the entire BIM Supportive Living Services team, I want to express my sincere gratitude for the trust you place in our organization and for the unwavering dedication you demonstrate to your loved one. The partnership between BIM and the families and conservators we work alongside is one of the most important elements of the meaningful, high-quality care we strive to deliver every day.

Our mission at BIM Supportive Living LLC is clear: to support every individual we serve in living a fulfilling, dignified, and self-determined life in the community they call home. That mission is best achieved when we work together — openly, respectfully, and with a shared commitment to the well-being of the people at the center of everything we do.

I welcome any questions, concerns, or feedback you may have regarding the contents of this memorandum or the services we provide. Please do not hesitate to reach out

through the appropriate agency channels. I am honored to serve alongside you in this important work.

Jamelle

Wallace

BIM

Agency
Supportive

Living

Director
LLC

July 1, 2020

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