

# *A journey with people towards self-direction*

**Leanne Burke** works for Staffing Options in Queensland. She manages the establishment of systems to enable people who want to direct their own support or direct on behalf of their husband, wife, son, daughter, brother, sister or another person they are in a committed relationship with. Leanne, along with a small team of development workers, can provide assistance with planning, implementing and reviewing the supports required. She has previously worked for, and assisted to establish, several small family- and member-governed services. Leanne is also actively engaged in a family-directed support arrangement on behalf of her sister. This role is undertaken as part of a loving family who collectively have a life time of experience in creating informal and formal responses, some more successful than others.

Staffing Options has been actively engaged in establishing self-directed support since 2006 and hosts individual self- and family-directed arrangements as well as a collectively member-governed group of 10 people. Staffing Options works one person at a time with individuals who have no or very little family support through to individuals who have a large amount of informal support in their lives.

The article that follows has been adapted from a presentation at a series of workshops held by the Alliance for Self-direction, a group of people who have actively engaged in the foundation of a range of self-direction initiatives either within or outside of existing service structures. The Alliance has a vision that all Queenslanders with a disability will have the autonomy to envision, live and direct their own lifestyles.

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It starts with getting clear about your business.

To cut a long story short Staffing Options began negotiating self-directed support arrangements because we were asked to. Staffing Options has been operating for 15 years in Queensland and is principally a staffing agency. As such, we struggle with the notion of being a service provider. However, we have always demonstrated a willingness to work with individual requests and to grow in response to these requests. Being asked to negotiate self-directed support arrangements was another opportunity to do this.

Staffing Options has responded to requests to hold funds on behalf of individuals since its early days so, in a sense, has developed a self-directed response over some time, though unintentionally and rather reluctantly at first. We had no issues with administering the funding but were rather reluctant about being in the role of 'service provider'. A further development was

in response to a member-governed collective which approached Staffing Options to be a 'Host Agency' for its project funds and the funds of the individual members. In agreeing to do this, Staffing Options gained experience in developing an agreement and negotiating roles and responsibilities as a means to delegate authority to a collectively member-governed group.

However, it was when Staffing Options was asked to hold funds on an ongoing basis on behalf of individuals that we had to intentionally set up a system that was going to meet the requirements of funding bodies while allowing people to be as free as possible to manage their own supports in the course of directing their own lives.

We used experience that we had gained internally. We also harnessed the experience gained from a number of family and service user- or member-governed organisations in Brisbane who over many years had laid the foundations of self or family-directed support in Queensland. We also read a lot and spoke to a lot of people who had experience of self-directed support.

This time of learning and exploration led to the development of a culture within Staffing Options based on the belief in people having authority over the supports they receive. Time was also spent on the development of the structures and practices to enable that to happen.

As this work developed we were advised of the importance of being very clear about what was and wasn't our business. The business of everyday life that we all cherish, our private lives, customs, relationships, security, preferences, is clearly not the business of service. Nor is decision-making which belongs with each individual, based on the authority they have over their own life or on the natural

authority for support in decision making that is sought from family and friends. The business of 'service', on the other hand, is clearly about the business of distributing public money and ensuring that processes are in place so that certain standards can be met and outcomes reached with that public money. Staffing Options believes that part of our business is also to work out how we can legitimately minimise bureaucracy in people's lives.

## HOW IT WORKS

A traditional approach to support could be described as the delegation of authority from the funding body to paid managers and co-ordinators to ensure outcomes. In a self-directed arrangement authority is delegated instead to 'non-paid' people to direct service provision - the person in receipt of funding or someone very close to them. It is important to note that, although funds are given directly to individuals or families in some jurisdictions, this is not the case currently in Queensland. In self-directed arrangements, funds need to be brokered through a recognised service provider.

## Structures

Staffing Options uses the term 'Host Agency' to describe the relationship between the service and the individual. This term was used by the collective that first asked us to consider this kind of arrangement. It was felt that the term 'hosting' reflected the relationship Staffing Options has with the people in receipt of funding.

The Host Agreement is the document that outlines the roles and responsibilities of each party to the agreement. It lists the conditions under which the relationship between the person directing support and Staffing Options can be sustained and also the requirements that Staffing Options must meet to administer the funding. The Agreement and the attached conditions form the core of the safeguarding process for all concerned and make clear the delegation of authority and responsibilities for both parties.

## Policy and Practice

We were helped in the process of developing policy and practice by our contact with the people who originally asked us to help them with self-directed support. They were all people who could reasonably articulate their vision, who had done the necessary planning and who were looking for an agency that would let them put

their plans into action. We had good mentors to learn from. As a result of these early experiences, Staffing Options has come to believe that self-directed support is for people, and their supporters, who have a genuine desire to make the majority of decisions about things that happen for themselves and to have primary control of their support arrangements.

In developing policy and practice decisions it became apparent that there were some matters that must remain non-negotiable in order for Staffing Options to be able to meet its obligations to the funding body and to ensure that we stick to 'our business'. Other matters remain open to negotiation.

## Core Elements

These non-negotiables have become the Core Elements that we consider necessary before Staffing Options will agree to 'host' a self-directed support arrangement:-

### 1. Leadership exists

The person with a disability and their family and/or supporters have a vision for a good life and can clearly identify how funded supports will assist or they are willing to work to develop this.

### 2. Authority for decisions is as close to the person as possible

The person wants to remain in control of their own life influencing decisions and choices. Staffing Options defers to the natural authority of family and committed friends to make decisions on behalf of the person requiring support where the person cannot do this for themselves or can do so only partially.

### 3. Administration of Funds

The individual or family has private resources or government funding that they wish to use to create a personalised service by directing their own supports and influencing service design and implementation.

According to the conditions of the Host Agreement the person directing support has the authority to select and direct the level and type of administration support from Staffing Options that they desire.

- Staffing Options can provide all the payroll services of a 'legal employer' for any staff required (eg. support workers, key workers,

co-ordinators), however each individual or family would take on the responsibility of recruiting, selecting and managing their own staff.

- Staffing Options can also set up each individual or family to manage their own funding through a transfer of funds so that they can then either employ their own workers or engage contractors and other supports directly. The individual or family has responsibility for recruiting, selecting and managing staff as well as the administrative roles involved in being an employer. Staffing Options brokers the funds and has responsibility for matters such as meeting all the accountability requirements of the funding body.

Some people choose to use a combination of both systems. Staffing Options ensures that the two systems remain viable options in the sense of being both legally viable and easy to use.

#### **Developing roles and responsibilities – access to ongoing support**

Whichever option or combination is chosen, Staffing Options is the administrator and it is important that its role remains purely administrative. According to the Host

Agreement, Staffing Options delegates responsibility for recruiting and directing workers to the individual or person delegated to direct support.

Examples of what the person directing support would be required to do include:-

- determining the amount and type of support required
- deciding who to employ to provide support
- providing adequate induction and training opportunities to people employed
- directing the support provided
- ensuring a safe work environment
- following any guidelines established designed to ensure sound employment practices
- ensuring supports provided are within budget and forwarding all documentation as required

The person directing support may choose to delegate some of these 'service business' roles to paid workers. This can be organised as part of the funding arrangement. In some cases a key worker is employed to manage these tasks. In other cases the tasks are shared between the staff team or are delegated to staff hired through a recruitment service.

The challenge for individuals and families in terms of the future for any self-directed arrangement is the sustainability of the arrangement – what safeguards can be put in place for the time when the person or persons currently directing support can no longer do so.

## WHAT WE HAVE LEARNED

Staffing Options has learned much during the past 5 years of this journey with people towards self-direction. It is clear, first of all, that each self-directed arrangement can be very different to the next. We know that tasks that are easy for some people are a major challenge to others. We recognise that many people need time to firmly establish one part of their arrangement before being ready to move on with other elements.

We have learned that the more intensive support we can provide in the set up phase the more likely the sustainability of the arrangement. In recognition of this we have recently begun to use funds from the administration fees to employ support development workers to assist people in the establishment phase. Support development workers can assist each person individually with what they identify to be the more challenging aspects of the arrangement e.g. assistance with developing interviewing skills or assistance with running a meeting. The aim of the work is to build capacity in people and to help establish more autonomous arrangements.

People who have been self-directing have indicated that they are experiencing increased choice over the people they engage and greater control over the type of supports they receive and how these are delivered by staff. One of the most commonly reported benefits is that people now feel that they have the opportunity to talk directly to the people they engage. This has led to support requirements being better met, improved relationships with staff, improved retention of staff and the ability to disengage people who are not suitable.

There is also a sense of improved value for money amongst people involved in self direction.

Administration costs are clearly defined by the percentage charged and people generally report being able to purchase increased support and/or have better outcomes for their dollar.

People have also commented on having improved emotional health and a sense of being able to get on with life now that they have the control and ability to make decisions about their own life.

These benefits may not be easily recognised when people are starting the process of self-direction. There is much to negotiate and many processes and procedures to establish.

However, in the main, people find that the choice to self-direct has been a positive move.

## SAFEGUARDS

### Strategies for organisational sustainability

It has been important to consider how self-direction arrangements can be safeguarded, as much as possible, into the future. These safeguards are important for the service as well as for individuals and families.

Staffing Options makes the assumption that the person and their family and committed friends are best placed to know their own needs and that they have the capacity to assume the responsibility to direct their own support. However, under the terms of its service agreement, Staffing Options is delegated authority from the funding body to ensure outcomes. In a self-directed arrangement this authority is then delegated to the individual or family who wish to become the directors of their own supports. This delegation of conditional authority is based on a mutually respectful relationship where ethical and honest behaviour is expected from both parties. Negotiations under this relationship include an assessment of risk and viability measures to manage potential risks to the person receiving support, the person directing support and to employees and contractors as well as methods of meeting administrative and legal requirements.

Staffing Options forms a "bureaucratic shield" or buffer from departmental requirements so people's lives are not consumed by paper work, administration, management or reporting requirements. However, conditional authority allows Staffing Options to step in to over-ride any action or decision which would place it in breach of its legal obligations. The general intention remains, however, that the support arrangements would operate as autonomously as possible.

The administration fee charged to individuals or families is another safeguard for Staffing Options. It provides a financial basis to administer the funds and to provide staff who are able to assist with the establishment and development of self-directed support arrangements and the development of assistance that may be required in the future to sustain the support arrangements.

### Strategies for sustaining individual arrangements

The challenge for individuals and families in terms of the future for any self-directed

arrangement is the sustainability of the arrangement – what safeguards can be put in place for the time when the person or persons currently directing support can no longer do so.

Staffing Options believes that it has an obligation to invest in planning activities with each person and their family and committed friends when we establish self-directed support arrangements. We encourage individuals and families to engage in planning for the future and recommend that they seek assistance from programs specifically established for succession planning or to include planning in their budget allocation. Planning support can be purchased within Staffing Options or we can assist individuals and families to engage a person of their choice from outside the organisation who is skilled in person-centred planning.

We are also starting to make plans to invest in further strategies to address this important question of sustainability. These include:

- Succession planning activities
- Further implementation of supporting roles – similar to the establishment of the recruitment service and the service development worker
- Development of more collective approaches
- Skilling up or collaborating with other family members in self-direction roles
- A framework to direct support into the future

As we continue to learn more about how self-direction can best work for people and to develop strategies for sustainability for individual arrangements and for our service, we know that staying clear about what is our business will remain fundamental to this process.