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1. Getting Started

This Information Sheet describes the key steps involved in developing a new shared living and support arrangement.

It contains three sections:

- 1.1 Starting Out
- 1.2 Action Plans
- 1.3 Vision, Mission and Guiding Principles

1.1 Starting Out

This Section presents the key steps for your group to complete when setting up this new shared living and/or support arrangement.

You have a Package and have decided to live with or nearby others with a Package and you are looking to identify the shared supports or resources that have been mapped out through support planning. This will also involve working with other individuals and their families to decide how this arrangement will work.

If you are moving out of your family's home to establish your own home, this is a significant change in your life.

It is likely that some individuals and families may want more or less control over the day-to-day operations. There are many questions to work through to create an arrangement that works best for the life you, and those you are sharing with, want to live.

Creating something new can be an exciting time with both challenges and opportunities ahead. Whether you are organising an event or creating a new group, having some key elements in place can help you to achieve your aims.

In developing a shared living and support arrangement, these elements typically include:

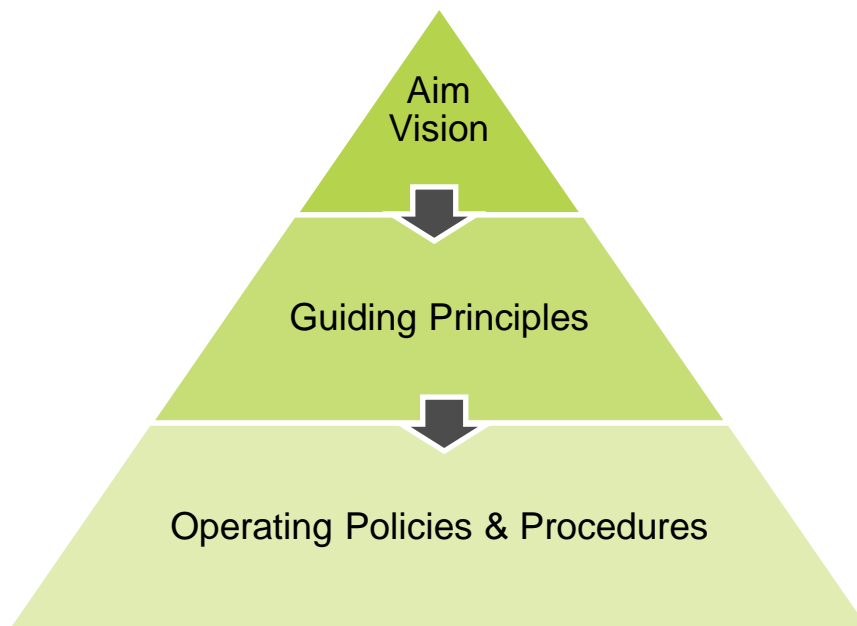
- Time – having the time to do the things that will help achieve your aims
- Capabilities – the skills and expertise of group members
- Support Plans – detailing how you will achieve your aims, what activities will be done, who will do them and when
- Specialist advice – identifying what tasks require specialist advice and getting this advice; for example legal, financial, planning or transition support.

Elements that guide decision making

In establishing a new group there are many decisions that need to be made. Identifying a framework that will guide decision making first, can help with later decisions about which options will best meet the needs of your group.

1. **Why** – Why are we doing this? What is our vision or goal? What are we trying to achieve? What does success look like?
2. **How** – How will we achieve our vision or goal? What are our values or principles? How will these values or principles help in achieving our vision or goal?
3. **What** – What is our operating model? What are our operating policies and procedures? Will they help achieve our vision or goal?

Figure 1: Aim, vision, principles and policies



1. First an aim, vision, or goal is identified. Some groups may have more than one aim or goal for their living arrangement. For example, receiving a quality of service.
2. Principles or values are then developed to describe how the group or organisation will operate and how the vision, aim or goal will be achieved. For example, all members will have an equal say in decisions.
3. Operating policies and procedures are then developed to describe specific parts of the group's or the organisation's functioning in more detail. For example, there may be a complaints policy with procedures detailing complaints management, dispute resolution, and appeals.

Having an established shared vision and principles provides a reference point for decision making about day-to-day operations.

More detail about each of these steps is provided in the *Governance Resource Kit: a tool for individuals and families* (the Kit).

Steps to achieving your aims

Whether you decide to set up an informal group or to create a legal entity (such as an incorporated association) to support your living arrangement, there are a number of steps between identifying a common aim or goal and beginning day-to-day operations.

Setting up a group to support your living arrangement is called a 'Governance arrangement'. Detailed information on governance arrangements can be found in Section 2 of the Kit (Establishment).

Figure 2 shown on the next page summarises the main steps your group will need to work through.

Figure 2: Steps in establishing your shared living and support arrangement



Sometimes you will need to work on more than one task at a time. For example, you could develop individual support plans while you are seeking advice and deciding what type of entity to establish.

Your group may benefit from the services of specialists to complete particular tasks on behalf of the group. These could include (among others):

- Recruiting support planners to assist in the development of comprehensive support plans and transitional plans. They may also assist individuals and their families to develop a succession plan;
- Employing a project officer to manage the multiple tasks needing to be completed;
- Engaging lawyers to provide advice about the entity arrangements;
- Engaging an accountant to advise your group about the financial arrangements; and
- Hiring an independent facilitator/third party to assist your group to make key decisions.

Your group could pay for this advice or you may discuss with the specialist whether they would consider providing the advice on a pro bono basis.

Tips and links

- See Section 1.3 (Vision, Mission and Guiding Principles) and the information sheet on Establishment (Section 2.4.8 on examples of governance arrangements) for examples of the visions and goals, and some ways groups have established similar arrangements.
- Not all supports and services will be covered by the Package and it will be important for the group to consider other means of obtaining funding or looking at what resources are available in the group (for example, personal income). Lawyers, accountants' fees, etc. are personal expenses not covered in your Packages.
- For details on what your Package will and will not cover, you will need to refer to the relevant guidelines and conditions of the funding.

1.2 Action Plans

This Section describes how to develop action plans. An action plan describes the various actions needed to create the new shared living and support arrangement and is separate to individuals' Support Plans.

Once you have agreed to establish a new shared living and support arrangement, developing an action plan is an essential step in achieving your aims. Action planning should start from day one and the plan will need to be revised and updated as work progresses.

Action plan elements

There are many different formats for action plans. Action plans can be short summary documents, a series of pictures, videos or a combination. For very complex undertakings more detailed action plans may be required.

Regardless of their size, effective action plans contain the following elements:

- Goals and actions – that are written in a SMART format (see diagram below)
- Timelines – having a due date for each goal or action
- Accountability – having a person or group responsible for each action
- Regular reviews – meetings or other processes to ensure that tasks are being completed and to identify any new tasks required.

SMART GOALS are:

- Specific
- Measurable
- Achievable
- Realistic
- Time Limited

For example.: By 1 July we will have selected a service provider

An example of a simple action plan is provided.

Tip

It may be useful to talk to others who have established similar arrangements about the actions they took and their reflections and learnings.

Example of a simple action plan

Action Plan as @ 15 May					
Activity Area	Task (What needs to be done?)	Person Responsible (Who will do it?)	Date Due (When?)	Status	Comments
Getting started					
Vision and mission	Have a meeting to discuss what we are wanting to achieve that will form our vision and mission	Mr Black	30 May	Postponed	Key members are away - will wait for their return to schedule the meeting
Establishment					
Seek advice	Obtain pro bono legal advice from Smith and Sons Solicitors about forming an entity	Mr Green and sub committee	30 June	Commenced	Preliminary meeting held on 1 March, awaiting final advice following second meeting on 2 May
Entity/agreement	Reach agreement about the type of group/entity we will form	Mr Green and sub committee	30 June	Commenced	Mr Green and the subcommittee have been reading about the different arrangements on the NSW Fair Trading website
Living arrangement	Signing the tenancy agreement	Mrs White Each individual is responsible for signing their individual tenancy agreement	15 March	Completed	All specifications have been provided. This was completed at the governance meeting on 15 March.
Operations					
Decision-making, dispute resolution, risk management	Draft job descriptions, decision making and dispute resolution for all roles in the organisation and create a risk register	Mr Orange	30 June	Commenced	Mr Orange has spoken with Mr Blue. He provided a sample job description that we can alter for our purposes
Overall management	Create a list of policies and procedures that are needed	Mrs White	30 July	Not Commenced	
Support coordination and	Identify what we are looking for in a service provider	Mrs Brown	15 March	Completed	

Action Plan as @ 15 May					
Activity Area	Task (What needs to be done?)	Person Responsible (Who will do it?)	Date Due (When?)	Status	Comments
provision	Meet with five possible service providers	Mrs Brown	15 April	Completed	Meetings were held with four providers
	Present information about preferred provider at general meeting on 20 May	Mrs Brown	20 May	Not Completed	
Support Provision	Complete transition plans for all residents	Ms Pink (project manager), individuals and families	15 July	Completed	Transition plans have been developed and are in the format agreed at the general meeting on 10 February
	Use the pooling tool to identify potential cost savings	All members	15 July	Commenced	Two members have used the tool

1.3 Vision, Mission and Guiding Principles

This Section describes why having agreement between group members about the vision and mission of the arrangements is useful and how guiding principles can assist your decision-making.

One thing that will assist your group to make decisions now and into the future will be developing and agreeing on your vision, mission, and guiding principles. It is important that you have a shared vision and mission; the starting point for this is being clear about your individual vision and the life you want to live.

What is a vision?

A vision is a short statement that describes the outcome you are working towards. Questions that could help you to create your vision include:

- What are we seeking to create here?
- What is our goal?
- What outcomes are we seeking for the individuals who will live here and their families?
- What type of community are we building?
- What would you want to see in two to three years from now?

It will be important to ensure that your group seeks input from all the individuals who will live here and their families, as required, about their expectations and vision for the arrangement.

When participants involved in the consultations to develop these resources were asked to describe what success would look like in two years from now, they mentioned the following:

- It feels like home;
- It is a community where individuals' needs are met and their strengths and opportunities are maximised;
- Each individual is living the life they want; and
- It is a place:
 - Where people can be actively engaged in decision-making
 - Where people participate in everyday activities and chores
 - Where people can be happy and lead full and productive lives
 - That is safe and where people feel they belong and are settled
 - That is fun and promotes family engagement
 - That develops friendships and mutual support
 - That offers an enriched environment
 - That allows people to develop new skills and their independence
 - That maximises each individual's potential
 - That promotes community participation and neighbourliness.

Examples from Australian and Canadian publications of visions in supported accommodation include:

- Fostering a spirit of neighbourliness;¹
- Creating an intentional community that is welcoming and is based on cooperation, developing longstanding friendships and mutual support and where each individuals' strengths and skills are recognised and shared;¹ and
- Using of a range of supports - informal support via family, friends and the community as well as paid supports.¹

Further examples are provided in the information sheet on Establishment (Section 2.4.8 on examples of governance arrangements).

What is a mission?

A mission statement outlines your group's role in achieving this vision. Some questions to assist you to develop a mission statement include:

- Why does this group exist?
- What are we trying to create?
- What is this group's role in achieving our vision?

It may also be useful to consider the different roles in each of the key parties and seek their input about this (e.g. individuals who will live together/nearby, housing provider, service provider, family members, etc.). It could also be useful to look at Australian policy documents relating to disability, housing and support and ensure that your mission is broadly aligned. Some are listed at the end of this Section.

What are guiding principles?

Guiding principles are based on a set of agreed values that will help guide your group's decision-making.

To illustrate, some principles mentioned by NSW families during the consultations for this Kit include:

- Mutual respect;
- Accepting diverse opinions;
- Treating each person as an individual with their own preferences, strengths and capacities; and
- Sharing decision-making.

Examples cited in publications include a belief that each person:

- Is as valuable as any other member of the community;
- Is able to engage in decision-making - sometimes using creative means to achieve this;
- Is able to contribute to their community; and

- Has the ability to create long lasting relationships - just needs ample opportunities to do so.

Key principles or guidelines

The following principles or guidelines could be used to underpin your shared living and/or support arrangements.

Governance arrangements should be based on:
• A clear vision and high ideals about the outcomes that are being sought (and these are consistent with people’s preferences);
• Ensuring all parties are well informed about all aspects of the arrangement and seek advice, as needed;
• Ensuring shared living and/or support reflects the individual’s choice and preferences;
• Persistence and creative problem-solving;
• Each individual (person with disability or family member) choosing the level of participation they desire in the governance arrangements;
• Mutual respect and trust;
• Openness and each person being able to express their views and opinions;
• Acknowledging diversity and each person’s contribution;
• Ensuring that people are actively engaged (and well supported if necessary) in any governance arrangements and decision-making;
• Clear agreements or contracts between parties;
• A clear agreement of how they will manage a range of scenarios and risks (such as if someone leaves or has prolonged time away, incompatibility, fund mismanagement, delays in paying bills, dissatisfaction with a support provider, etc.); and
• Clearly described roles and responsibilities.

Housing and daily life arrangements should ensure:

- Shared living and/or support arrangements reflect the person’s choices and preferences;
- Compatibility and connectedness;
- People accept that by choosing to live together and/or to share some support, some compromises may be required;
- Each individual’s strengths and capacities are harnessed and developed;
- That each person is supported in a way that upholds their rights and freedoms (i.e. in the least restrictive or intrusive manner) and reflects their individual support plan, goals and preferences;
- That each person is encouraged to try out new opportunities (including taking some reasonable risks); and
- That each person is able to furnish and decorate their personal space.

Each person is:

- The primary householder (via ownership or tenancy) and all parties acknowledge that this is their home; and
- The key decision-maker in regards to:
 - Who they live with, how they live their lives and who provides their supports
 - Leaving the arrangement if they choose
 - How much of the week they wish to pool their supports or to share in
 - Who can enter their personal space.

Each person has:

- A life of their own choosing;
- A key to their home and is able to invite visitors to a meal, stay over, etc.;
- A range of flexible supports (informal, community and paid supports) that meet their needs and preferences; and
- Involvement in daily life (e.g. routines, chores, paying bills, etc.) and valued roles in the community.

What are the potential benefits of establishing a vision, mission and principles?

There are a number of potential benefits of having reached agreements about your group's vision, mission and guiding principles. These may include:

- Creating a common sense of purpose and community; a *'belief that we are stronger together'*;
- Identifying what is in the best interests of the common good;
- Creating a basis of understanding about what is in the interest of common good;
- Ensuring the rights and support of each individual are inherent in the operation of the shared arrangement ;
- Forming the basis of decision-making and operational documents;
- Becoming the basis for *'how things are done around here'* and for how you will measure outcomes and success; and
- When tensions arise, they can form an agreed foundation for resolution.

What are the potential risks of not establishing a vision, mission and principles?

The risks associated with your group not having an agreement as to these matters include:

- Creating a situation where some members' views may dominate those of others and not reflect the views of the group;
- Not having agreement as to what is the 'common goal' or 'common good' means there is no basis from which to negotiate the compromises required in shared arrangements; and
- Conflict or breakdown of the group.

Where to next?

You now need to translate your vision, mission and guiding principles to become policies, procedures and day-to-day operations.

Tips and links

For further information use the following links:

- Exploring and reading other governance arrangements is a great place to start.
www.homeswest.org.au/
www.homeswest.org.au/The%20Homes%20West%20Experience.pdf
www.homeswest.org.au/Governance_June_2007.pdf
www.gettingalife.com.au/

International Conventions

- United Nations Convention on the Rights of Persons with Disabilities:
www.un.org/disabilities/convention/conventionfull.shtml
Australia is a party to this convention.

National policies and standards:

- National Disability Strategy
www.dss.gov.au/our-responsibilities/disability-and-carers/program-services/government-international/national-disability-strategy
- National Disability Standards
www.dss.gov.au/our-responsibilities/disability-and-carers/standards-and-quality-assurance/new-national-standards-for-disability-services

NSW Legislation, policies and standards

- *Disability Inclusion Act 2014*
www.legislation.nsw.gov.au/maintop/view/inforce/act+41+2014+cd+0+N
- Living Life My Way
www.adhc.nsw.gov.au/about_us/strategies/life_my_way
- Ready Together:
www.adhc.nsw.gov.au/about_us/strategies/ready_together
- NSW Disability Services Standards
www.adhc.nsw.gov.au/sp/quality/standards_in_action

1.5 Getting Started: References

1. Klees, J., *We come bearing gifts: The story of the Deohaeko Support Network* 1996, Scarborough.
2. Fratangelo, P., M. Olney and S. Lehr, *One person at a time: How one agency changed from group to individualised services for people with disabilities* 2001, St Augustine, Florida.: Training Resource Network Inc.
3. Dyke, J., *Choreographing Life.*, 2007, Homes West Association Inc.,: Brisbane, Australia.
4. Copeman, I. and N. King, *An evaluation of a community co-operative for people with learning disabilities in the East End of Newcastle upon Tyne*, Housing and Support Partnership, Editor 2010, Northern Rock Foundation,: Newcastle upon Tyne, UK.