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6. Templates

This Information Sheet contains a series of work sheets and templates for your use. Some were existing while others have been specifically developed for the *Governance Resource Kit: a tool for individuals and families*. Some of these may be useful to support your group, or to adapt to suit your arrangement.

Templates

- 6.1 Action List Template
- 6.2 Vision, Mission, Guiding Principles Template
- 6.3 Group Exercise Template
- 6.4 Recruiting a Service Provider Template
- 6.5 Policy Template
- 6.6 Procedure Template
- 6.7 Risk Register and Plan Template

Examples

- 6.8 Job Description and Support Agreement Example
- 6.9 Policy Example 1: Rights
- 6.10 Policy Example 2: Participation and Inclusion

6.1 Action List Template

<Insert group name or logo here>	Action List as @ <insert date>
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Activity Area	Task (What needs to happen)	Person Responsible (Who will do it)	Date Due (When)	Status	Comments
Getting started					
Establishment					
Operations					

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Activity Area	Task (What needs to happen)	Person Responsible (Who will do it)	Date Due (When)	Status	Comments
Shared Living					

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6.2 Vision, Mission, Guiding Principles Template

<Insert group name or logo here>

<Insert date>

Vision

<insert your group's vision here>

Mission

<insert your group's mission here>

Guiding Principles

<insert your group's guiding principles here>

6.3 Group Exercise Template

Instructions: Each person completes this exercise individually and then discusses the results with the other people in the group.

1. How much control do you personally want?

Rate the overall amount of control you wish to have over the items listed below.

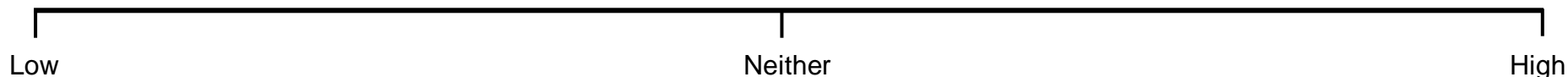
Area of responsibility	How much control do you want?			Comments
	No Control	Some Control	Full Control	
Governance				
Funding				
Services and supports				
Support staff				
Daily life				
Household costs				

Share your ratings with the other members of the group. Discuss how much similarity or difference there is.

Where difference exists, how will this be resolved?

2. Energy, availability and participation

Place a cross on the line to reflect your current energy, availability and participation level.



3. Ideas about how you could assist

What ideas do you have about how you could assist with the running of the shared living arrangement and how regularly might you be able to do this task? (Think about individual or group support, domestic, gardening, governance, coordination, managing the finances, decision-making, meetings, events, etc.)

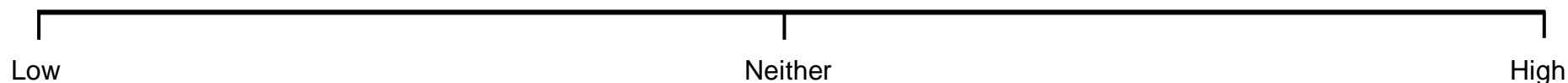
Task	Daily	Fortnightly	Monthly	Quarterly	Yearly

4. To help you to decide if your group will remain an informal governance group or form a legal entity, you need to consider the level of administration and legal protection and accountability involved and the extent to which they are aligned with your own preferences.

a) What level of administration responsibility do you want?

Consider if you are prepared to be involved in record keeping and the day-to-day administration (for example, staff recruitment, training, rostering, paying bills, minute taking, etc.) of this arrangement or want another party to complete these tasks.

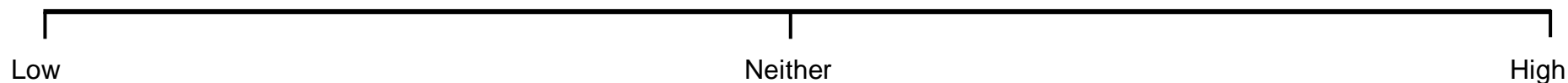
Place a cross on the line to reflect your preferred level of administration responsibility.



b) What level of legal protection do you want?

When thinking about the type of governance arrangement you want to establish, you will need to consider the level of legal protection you wish to have. For example, if you decide to use a service provider to fully manage the shared living and support arrangement, then they would need to meet the relevant legal and regulatory obligations. However, if your group wants to manage the arrangement, you may wish to consider forming a legal entity that will provide some protection to you.

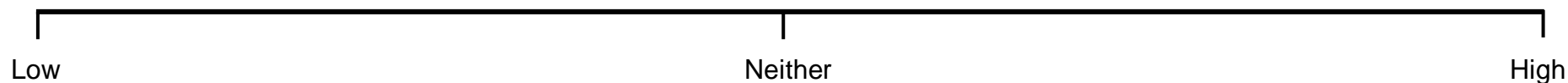
Place a cross where to reflect your preferred level of legal protection.



c) What level of legal accountability do you want?

Depending on the type of governance arrangement you develop, you may have some legal accountabilities (for example, record keeping and financial audits).

What level of legal accountability do you want?



6.4: Recruiting a Service Provider - Checklist and Rating Scale

Basic Principles	Very Poor	Poor	Neither	Good	Very Good
	1	2	3	4	5
Vision, mission and the extent to which these are aligned with your group's vision and mission					
Governance arrangements and extent to which these are aligned with your group's preferences					
Registration and accreditation status					
Evidence of outcomes for people currently being supported					
Operations					
Staff recruitment, training, retention and supervision practices					
Experience providing the range of supports needed					
Ability to provide individualised supports when preferred					
Promoting choice, control, independence, goals and participation					
Communication processes and practices with family and individuals					
Experience in developing and working within arrangements that include a range of informal and community supports					

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Basic Principles	Very Poor	Poor	Neither	Good	Very Good
	1	2	3	4	5
Day-to-day management arrangements					
Policies and Charges					
Policies and extent to which they are aligned with contemporary practice and your group's preferences					
Administration fee (if managing individualised funds also)					
Hourly rate for supports (weekdays, evenings, weekends, public holidays)					
Notice requirements to cancel or change day/ time of support					
Notice requirements to exit the arrangement					
<Add other items that are important to your group>					
Score (add up scores in each column)					
TOTAL SCORE (add individual scores above to create a total score. The higher the score the better the match)					

Adapted from Wesley Mission, Inclusion Melbourne, *Making your Choice*, 2013, Wesley Mission Victoria, Victoria, Australia.

6.5 Policy Template

<Insert group name or logo here>	Manual
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<Name of policy>	Policy No: xxx
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Issue No: 1	Pages:
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Issue Date:	Review Date:
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<insert policy text here>

Authorised person:	Position:	Date:/../.....
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Signature	
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6.6 Procedure Template

<insert group name or logo here>		Manual
<Name of procedure>		Procedure No: xxx
Issue No: 1	No. of Pages:	
Issue Date:	Review Date:	
Person/s responsible for this procedure:	<Insert name>	
<p>Purpose and scope: <insert text here></p> <p>Procedure: <List sequentially exactly what must be done (specify any exclusion)></p> <p>Documentation: <List documentation to accompany the procedure. Provide example/s of completed documentation></p> <p>Records: <List any records that are kept related to the procedure, where they are stored and for how long></p>		
Authorised person:	Position:	Date: ../../.....
Signature		

6.7 Risk Register and Plan Template

#	Risk	Likelihood	Impact	Minimisation/ mitigation/ safeguarding strategies
1				•
2				•
3				•
4				•
5				•
6				•
7				•
8				•
9				•
10				•

6.8 Job Description and Support Agreement Example

Our PA (Support Worker) Job description and person specification

Job Title	Personal Assistant (PA)
Reporting to	<i>(name of group or employer on behalf of the group)</i>
Role	(e.g. To support us to go bowling once a week)
Salary	\$.....per hr
Working Days / Hrs:	
Location:	
About Us	Some brief information about the people in the group:
Typical PA Duties	A list of the things we would like our PA to help us with:
1.	
2.	
3.	
4.	
5.	
6.	
What we expect of our PA	<ol style="list-style-type: none"> 1. You should be prepared to carry out all reasonable tasks specified by us, as agreed. 2. We expect you to understand the role in facilitating our needs by asking what these needs are and listening to our requests. 3. Please respect our possessions and use any equipment only with our permission/as agreed. 4. Please let us know when you have concerns for our health and wellbeing. 5. Keep us up to date with changes in your health that may affect our health, wellbeing, safety, and morale.

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Job Title	Personal Assistant (PA)
	6. Tell us if there is anything worrying you about your role in supporting us.
Training	You should be prepared to undergo training, if needed, to meet the requirements of the job description or to improve your skills.
Supervision and Induction	This will be provided by You will be expected to keep the lines of communication open, so that dialogue between us is constructive and helpful to all parties. Any worries that you have must be reported to us immediately. We will arrange for regular supervision meetings, but you are also expected to work under your own initiative.
Confidentiality	You must respect our privacy and that of our family and friends. You must maintain a professional approach and not divulge any information gained during your employment, such as health condition, finances or personal circumstances, except with express permission.
Person Specification	The sort of person we are looking for (add your own criteria if required):

CHARACTERISTIC	ESSENTIAL	DESIRABLE
QUALIFICATIONS/ ATTAINMENTS	Good writing, reading and numerical skills	Certificates in Food Hygiene, Moving and Handling, Basic Health and Safety, First Aid. Cert III in Disability Support
RELEVANT EXPERIENCE	Experience with:	Previous care related experience
SPECIAL APTITUDES/ SKILLS	Patience and being able to explain things simply and calmly. Understanding of Employer needs. Problem solving and organisational skills. Listening skills Able to work on own initiative	Taking responsibility for problems as they arise

CHARACTERISTIC	ESSENTIAL	DESIRABLE
	Able to anticipate problems Dependable and reliable	
PHYSICAL REQUIREMENTS	Good level of fitness	Able to carry, lift, push and bend
PERSONAL CHARACTERISTICS	Confident, personable, cheerful, approachable, tactful, honest and trustworthy Good sense of humour and can-do attitude	
PERSONAL INTERESTS		Range of social interests and able to mix with all types of people.

Adapted from RUILS

ruls
www.ruls.co.uk

6.9 Policy Example 1

Policy: Rights		Policy No: ##
Issue No: 1	Pages: 2	
Issue Date:	Review Date: 7	
<p>Our organisation operates within a human rights framework and takes steps to ensure the rights for people with disability are maintained. These rights are consistent with the <i>United Convention on the Rights of Persons with Disabilities</i> and the <i>National Disability Standards</i>.</p> <h3>United Nations Convention on the Rights of Persons with Disabilities</h3> <p>Australia, as a signatory to the <i>United Nations Convention on the Rights of Persons with Disabilities</i> is committed to the rights outlined by the UN. These include, but are not limited to:</p> <ol style="list-style-type: none">1. Everyone is entitled to all human rights and freedoms, without distinction of any kind2. Recognising that discrimination against any person on the basis of disability is a violation of the inherent dignity and worth of the human person3. Recognising the diversity of persons with disabilities4. The right to participate in political, and public life, and economic, social and cultural life with equal opportunities5. The right to an adequate standard of living, protection and security6. Respect for privacy7. The right to live independently and be included in the community8. The right to freedom from exploitation, violence and abuse. <h3>National Standards for Disability Services</h3> <p>In addition, Australia has its own <i>National Standards for Disability Services</i>. Points emphasised within the Standards include (page 11):</p> <ul style="list-style-type: none">• <i>Dignity and respect</i>. This includes making people feel valued through informal conversations, valuing their contributions to discussions or activities and so on.• <i>Freedom of expression</i>. Creating an environment where residents feel comfortable expressing themselves and knowing that their voices will be heard. Individuals also have the right to voice any discontent that they have with the service.• <i>Self-determination</i>. Empowering individuals to follow their goals and have a positive outlook toward achieving them.• <i>Choice and control</i>. To the greatest extent possible, each individual is provided with opportunities to make decisions and to be in control of their lives and		

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supports. This includes deciding their daily routines and activities.

- *Confidentiality and privacy.* This consists of legal requirements such as confidentiality of medical and financial records, but also personal privacy such as requesting permission to enter a person's bedroom/home.
- *Freedom from discrimination, exploitation, abuse, harm, neglect and violence.* At no point should an individual be subject to, or be threatened with any of these items. All individuals have a right to feel safe and secure in their home and with the services they receive and their staff.
- *The role of families, friends, carers and advocates in the safeguarding of rights.* Individuals should always enjoy freedom of access to these people and the comforts and opportunities they provide. This can be maintained through regular visits, shared activities and so on.
- *Comprehensive systems to prevent or promptly respond to any breaches of rights.* These systems focus on enforcing policies regarding issues such as health and safety, record keeping, dispute resolution and legal access.

All the people we support will receive information about their rights and we regularly monitor services to ensure they are consistent with these rights.

For more information please refer the following items in our manual:

- Complaints procedure
- Person-centred practice policy and procedure
- Planning and review procedure
- Privacy and confidentiality.

Authorised person:	Position:	Date: ../../.....
Signature		

6.10 Policy Example 2

Policy: Participation and Inclusion		Policy Example
Issue No: 1	Pages: 1	
Issue Date:	Review Date:	
<p>Consistent with our person-centred practice, each individual is encouraged and supported to contribute to social and civic life in their communities in ways that are important to them.</p> <p>We strive to ensure that each individual lives the life of their choosing and where they can achieve their goals. This can include (but is not restricted to) being supported to engage with the wider community, shared activities, attending community and cultural events, going out with friends and family, informal discussions, employment and education. It also includes providing a welcoming environment where friends and families can visit and stay.</p> <p>The <i>Australian National Standard for Disability Services</i> outlines the following indicators for successful practice in this area (page 14):</p> <ul style="list-style-type: none"> • The service actively promotes a valued role for people with disability, of their own choosing. • The service works together with individuals to connect to family, friends and their chosen communities. • Staff understand, respect and facilitate individual interests and preferences, in relation to work, learning, social activities and community connection over time. • Where appropriate, the service works with an individual's family, friends, carer or advocate to promote community connection, inclusion and participation. • The service works in partnership with other organisation/s and community members to support individuals to actively participate in their community. • The service uses strategies that promote community and cultural connection for people from a culturally diverse background and Aboriginal and Torres Strait Islander people. 		
Authorised person:	Position:	Date: .../.../.....
Signature		