



Shared Management

A guide for Support Organisations exploring Shared Management

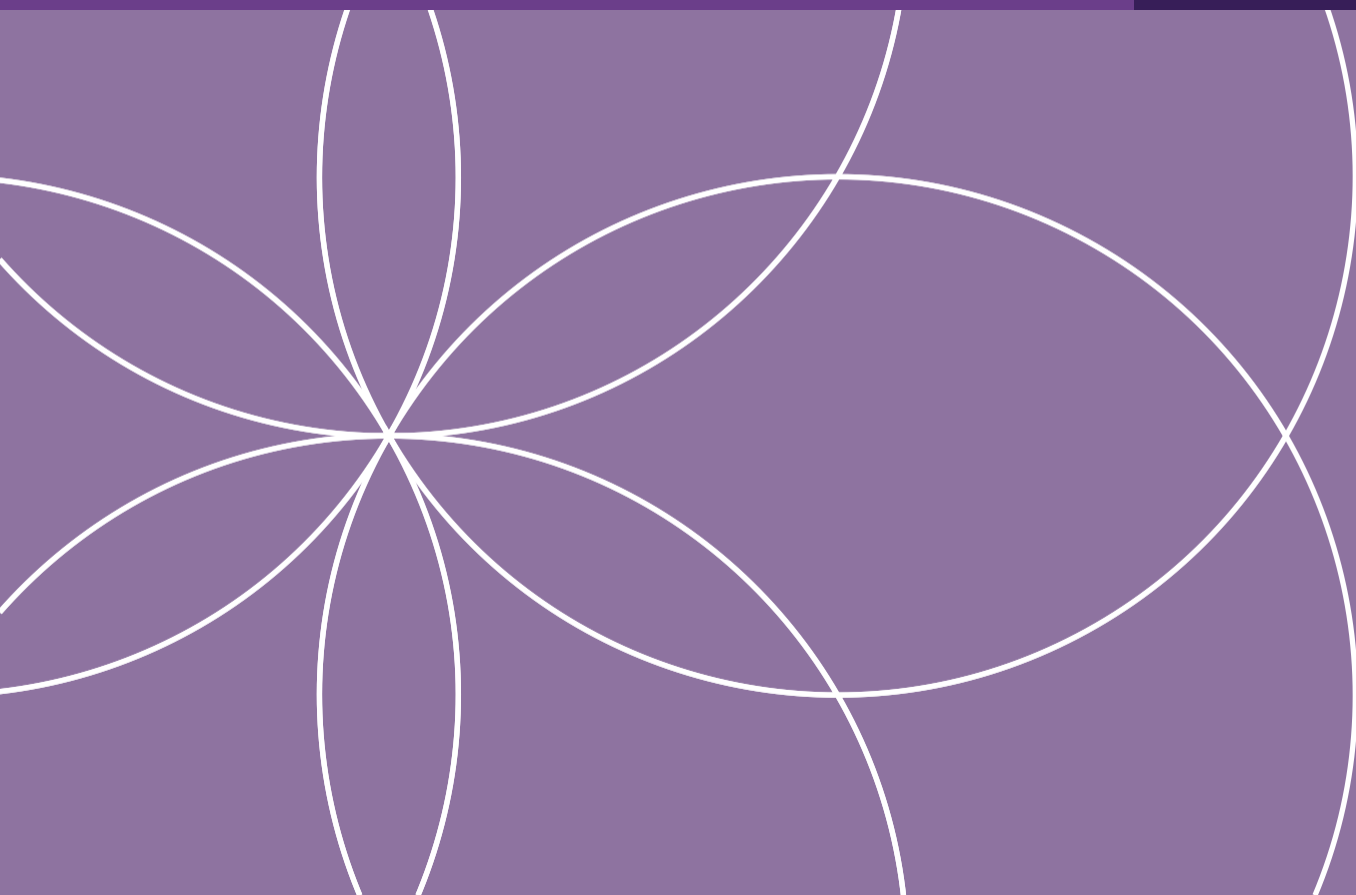
“ Shared Management honours my freedom to be a part of the thinking, designing, developing and problem solving – to be recognised as having a **big** part to play, after all no one (no agency or manager) knows me, like me!

Justin ”

June 2017

Updated as at June 2017

Please ensure you check the WAIS website www.waindividualisedservices.org.au for the most up to date version as this is intended as a living document regularly updated and improved.



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Introduction and Context

The foundation of all modern societies is the acknowledgment of everyone's right to exercise their citizenship by leading and directing their own lives. It is essentially one of the most basic and fundamental elements of being human. This basic right matters to **everyone** regardless of ability, age, health or experience. The ability to decide how you want your life to be, who you want to be connected to and how you are supported are essential factors that we all understand and expect in our own lives.

Across Australia and internationally, there is a significant shift in how supports are provided to people, who require assistance and support to live a full life as active citizens. This is being captured in the term Self Directed Support.

Western Australia has a strong history of exploring and supporting innovations that promote peoples' choice, control and ability to determine and direct their own lives. Self Directed Support aims to ensure that people can direct their support and decide how to best use the resources available to them.

This approach requires a significant change in the way that we all, including the Funders and Support Organisations work alongside people and families as equal partners.

Shared Management is one way of achieving Self Directed Support. It is where a person and/or their family work with a Support Organisation, sharing the management of their support arrangements. It provides a mechanism for people to direct, control, manage and monitor their support, in way that makes sense to the person, their family and their communities. It is an approach that works to increase people's control and support them to achieve their outcomes, enabling people to live their lives in a way that they choose, with the right support.

Shared Management is not about people 'having to' manage all aspects of their funding and supports. It's about people being able to take on the level of responsibility and control that they want for each aspect of their support. Shared Management offers the potential of self direction for all people supported by Support Organisations whether they manage their own funding or not. This guide provides an overview of Shared Management and how people, families and Support Organisations can make it work for them in Western Australia. This guide is aimed at Support Organisations considering or exploring Shared Management as well as those already providing Shared Management.

Supporting people to have real choice in their lives and control over the resources available for their support, is a fundamental shift in the way that we have historically organised support for people.

It is this change that many people who use services have wanted to see for a long time.

The ultimate success of Shared Management will rest on the commitment to the principles underpinning this approach. This commitment leads, in turn, to Support Organisations developing knowledge and skills that are different from the past - to work as enablers and advisors working with people to improve their access to information, knowledge and skills. In this there is a challenge for us to support people to understand and navigate the technical and legal aspects of managing their own services.

People and families tell us that one of the biggest factors in making Shared Management work well is a belief that people and families are the experts on their own lives and the relationship between themselves and the Support Organisation is based on this.

“ Shared Management honours my freedom to be a part of the thinking, designing, developing and problem solving – to be recognised as having a big part to play, after all no one (no agency or manager) knows me, like me!

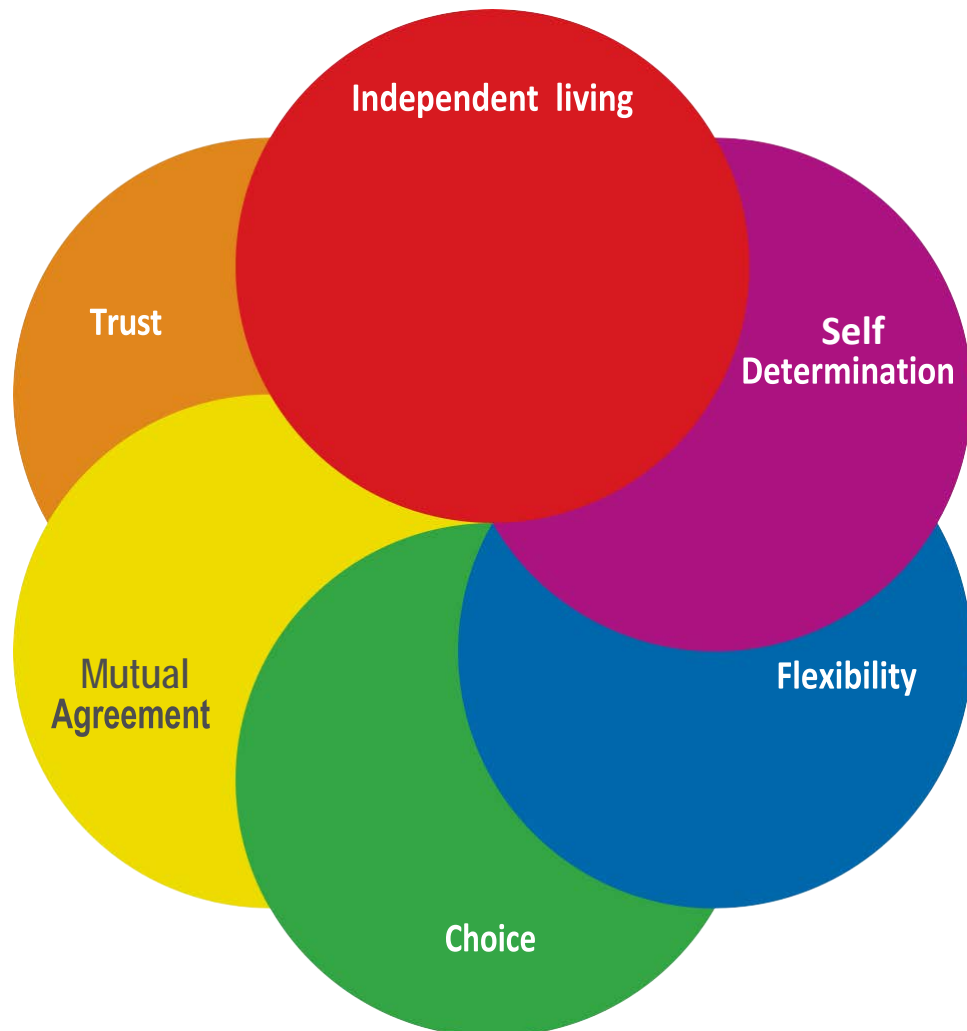
Justin ”

Shared Management is a Western Australian initiative that has been developing since the early 1990s. Its growing success is based on people, families and Support Organisations working hard at imagining better and overcoming today's technical challenges to create new and empowering approaches for tomorrow.

Historically, Shared Management has been undertaken in the disability sector, however, due to its success it is now emerging in Aged Care and Mental Health.

Support Organisations making a commitment to the following fundamental principles that underpin Shared Management will ensure their approach to Shared Management truly supports self direction.

The Principles of Shared Management



Independent Living – the right to be a citizen with full access to an ordinary life

Self Determination – The right to be in control of your own life and be acknowledged as the expert in 'you' and for your views and preferences to be acknowledged and reflected in your support arrangement

Flexibility – the right to decide how to use your resources and how they will be managed to best suit you and your lifestyle

Choice – the right to choose how much responsibility you have within a Shared Management arrangement based on your choice, preference and ability

Mutual Agreement – the right to be treated fairly and honestly in how agreement is reached

Trust – the right to be trusted as an equal partner in the Shared Management arrangement regardless of level of responsibility chosen

In considering Shared Management, Support Organisations can build on the experience of other organisations and develop their own approach in partnership with people and families.

It is clear that Shared Management opens up so many new possibilities to people, families and communities. People have developed and retained excellent support systems around themselves, and have also developed their own confidence and self belief in their abilities to direct, manage or employ people. Shared Management offers Support Organisations the ability to really share power with individuals and their families, so that they can grow and develop in their own lives, living well and achieving their own personal outcomes.

Understanding Shared Management

Shared Management is an approach to organising and managing support in a way that is led by individuals and families, in partnership with a Support Organisation. Like all good effective partnerships Shared Management requires a respectful trusting relationship.

In offering Shared Management, Support Organisations are clearly acknowledging people's right and expertise to design, implement and manage their own support service. Any Shared Managed arrangement should suit that individual and family and is based on an agreement of how the support system will work and be managed.

Shared Management essentially offers an honest and transparent mechanism to:

- Understand and participate in the range of tasks involved in designing, planning, setting up and managing a support approach.

and

- Define an agreement between people, families and the Support Organisation about who is responsible for each task in the short and long term.

It is important that we understand the subtle yet significant difference between directing your support and being responsible for the tasks involved in organising your support. There is often confusion around what constitutes control. To be in control, or to direct your own support, does not mean having to manage and be responsible for all tasks and funding – it means being heard and respected as a unique individual with preferences about how and who should offer your support. It means having a say in designing your support. It does not mean having to be responsible for all of the tasks if this doesn't suit you or your lifestyle.

“ We have the freedom of recruiting, employing and training my son’s staff without having to also process time sheets, manage annual leave forms and pay taxation.

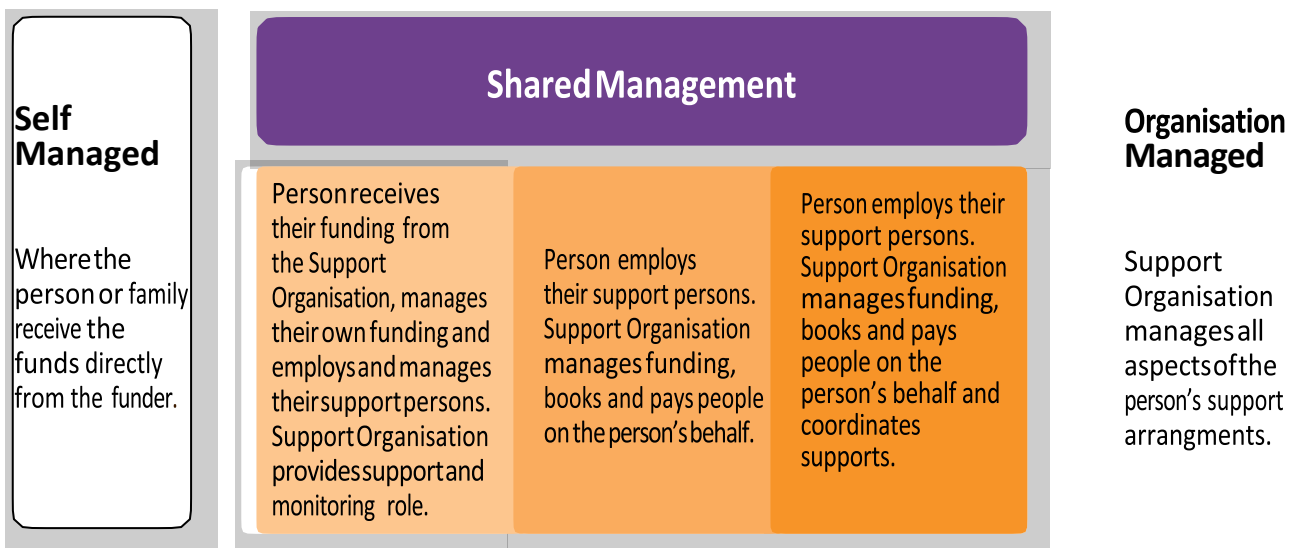
Parent ”

Shared Management can be so flexible that it is possible to have lots of control and say over your support with little responsibility to manage the tasks required.

“ I am in full control of my support including who supports me, how they do it, and what they offer. However thankfully I don’t have all of the hassle of the paper work, training and governance stuff, my Provider does all of that – I’ve done all of that before and I choose to have it this way – this is control – it’s just right for me!

Justin ”

One way to understand the level of control and responsibility involved in Shared Management is outlined in the following graph: Options in Shared Management.



Successful Shared Management offers a range of choices to support people to be in control from as little as having a say in how you want things to happen, to managing all tasks.

“ I manage everything, I manage my budget and manage my team – I set the rate of pay, I am their employer – I have kept my support team for years – it works well for all of us

Brian ”

It is important that the support options offered by the Support Organisation to an individual seeking a Shared Management approach are aligned to the Support Organisation’s internal capacity and systems. For example, if the Support Organisation is to transfer funds to the individual or their family to manage their supports directly, then an appropriate internal financial system to support this approach is required. If the Support Organisation is to offer a book keeping service to manage the funds on behalf of the individual or their family then having a process that informs individuals on the use of their funding is important. Involving people in recruitment requires an investment in exploring accessible processes for people to really be part of. All of the options also require organisational consideration to ensure they are sustainable options for people and their families.

It is essential that Support Organisations understand the need to align the Support Organisation’s vision, mission and principles with those required to offer Shared Management. This requires a commitment at all levels of the Support Organisation.

It is the principles at the heart of Shared Management that make this option work so well for many people.

Shared Management is a “living” process and approach. The mix and match of responsibilities undertaken by the person, their family and their support organisation is not only dependent on the choices made by the person and the agreement made between the person and their support organisation but also by their circumstances at any one time. As such, the mix and extent of responsibilities may ebb and flow over time depending on both the capability and capacity of the person.

To follow are 5 key areas of responsibility that people can choose from when developing a shared management arrangement with an organisation:

- 1) People recruiting and managing their own supports
 - a. Formally people are the “employer” of their own support workers;
 - b. Associated responsibilities could include recruiting, inducting, training, supervising, performance management;
- 2) Co-ordination of supports
 - a. Organising and managing the schedule of supports;
 - b. Associated responsibilities could include timesheets, developing back up plans and safeguards for people and their support workers;
- 3) Service Management supports
 - a. This is a key aspect of the partnership between people and Support Organisations – this is a development and capacity building role that provides ongoing support and advice to people;
 - b. Associated responsibilities could include information, advice, guidance, transition planning, safeguarding (for example, sustainability of the support arrangement, back up plans;
- 4) Responsibilities to the funder
 - a. Ensuring compliance with funder requirements;
 - b. Associated responsibilities could include budget monitoring, maintaining records, financial auditing, standards compliance and reporting; and
- 5) “Bureau” services
 - a. Legal and regulatory obligations associated with the person being an “employer”;
 - b. Associated responsibilities could include payroll, taxation, superannuation, industrial relations, insurances, healthy and safety, human resources management.

Service management supports is a critical and distinct element in Shared Management focused on continuous capacity building towards increasing participants capabilities. It is a dynamic process between co-ordination of supports (2) and service management support (3) dependent on both the capabilities and capacity of the person at any one time. The ability to undertake these roles requires a key skillset.

Service management supports, therefore, recognises that despite the intent of building capacity, there may be times when individuals or their family members may need to lessen their responsibilities until they are ready to increase them again. It is the flexibility of the arrangement that is critical in this space.

Choosing Shared Management

If Shared Management is implemented well with a range of flexible approaches to support self determination, it should be a viable option for all people regardless of ability, age, health and circumstance. All people can influence the direction of their support if respected, acknowledged and heard.

It is important that as we work to increase people's control and potential responsibilities we do this in a respectful and honest way. Shared Management is not about burdening people with responsibilities that they either do not wish to have or are unable to complete due to lack of capacity or circumstances to manage the actual tasks.

Shared Management is for **people and their families** who want some or all of the following:

- more choice and control over their support and life;
- to be respected as an expert on their own life;
- to determine their own personal outcomes and arrange supports accordingly and based on their preferences and what's important to them
- to have a say or a role in managing their support;
- to take on some of the tasks and responsibilities;
- willing to work in partnership with their Support Organisation of choice; and
- willing to fulfil their part in the Shared Management Agreement.

Shared Management is for **Support Organisations** who are willing and ready:

- to genuinely hand over control to people and families;
- to develop a range of strategies to enable people to have more say and control over their support;
- to work in genuine partnership with people and families – aiming to develop a relationship based on mutual respect, shared understanding and honest communication;
- to develop a range of options where people can take on some or all of the responsibilities and tasks required in employing supports;
- to be open, honest and transparent regarding costs for all aspects of managing the person's funding;
- to observe and fulfil their mutual responsibilities; and
- to safeguard all parties respectfully.

“ I don't want people coming around and organising my life. I manage myself and my life. If ever I need any help or advice I can always ring the office. That's all I need.

Brian ”

Benefits of Shared Management

Shared Management offers such a unique and personalised approach that it can offer benefits to many people and their families. Shared Management offers such fluidity in how much responsibility people and their families want to take in managing their support, that it is possible to suit many people's preferences and circumstances. Another significant benefit is the responsiveness and ability, of the approach, to tailor and adapt the level of responsibility chosen by the person at different times in their lives. Having more responsibility when life and circumstances permit or having more support, if and when needed.

Ultimately, Shared Management is a "living" process.

Shared Management offers potential benefits to:

- People and families;
- Support Organisations; and
- Communities.

“ Best thing I ever did was to come out of the...
Centre and manage my own supports. Life is as
normal as possible. I was always a person that
did my best and managed by own life.

Brian ”

People and families have the chance to direct, control and actively contribute to their own support system. To be respected and valued as an expert in your own life and as an equal citizen.

“ We think it is a fantastic way of giving us and our son choice and control without being overwhelmed by the bits we have no skills for. ”
Parent

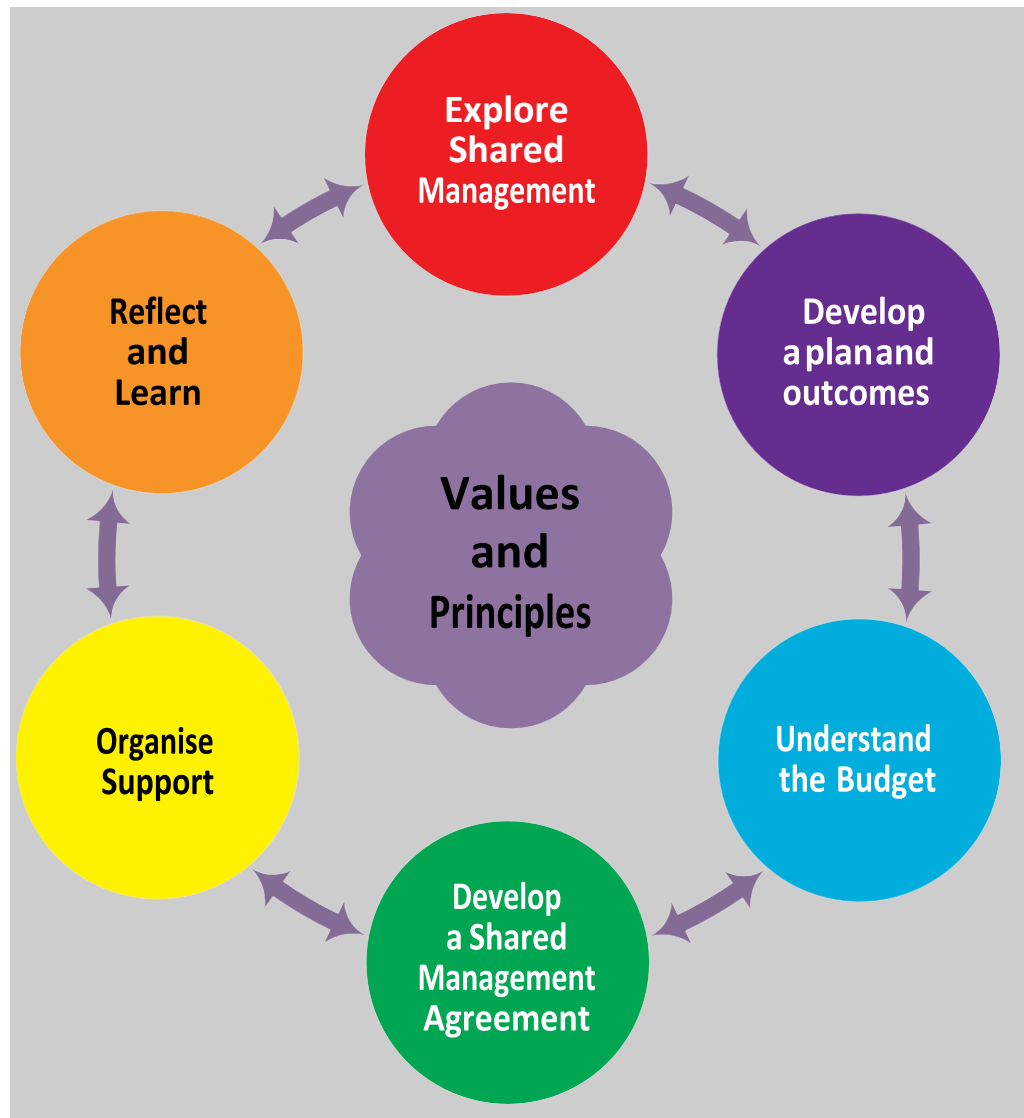
Support Organisations learn from the people they support by having the opportunity to work in a partnership with each person and family which, in turn, benefits their whole organisation as they learn from each shared managed arrangement about what it takes to offer good support, shared safe-guarding and delivering real person-centred outcomes.

“ Shared Management teaches us how to stay on our toes and work WITH people – this is the way for the future for everyone. ”
Support Organisation

Communities strengthen and grow with the participation of people who have often been excluded (in valuable and socially valued roles as an employer, a manager and a director).

“ ‘Justin is a brilliant capable manager who teaches me about what it takes to really support and manage people’ ”
Friend of a man who manages his support

Components of Shared Management



“ Just do it! Start at a level where you are comfortable and take on more as you are able. ”
Parent

Exploring Shared Management

For people and families approaching a Support Organisation for the first time it can be a daunting prospect. The Support Organisation's ability to respond in a person centred, clear and transparent way can make a significant difference to people and families' initial experience and how they direct their future support. Exploring life from the person's perspective is crucial in understanding what they may be looking for in future support.

Most people have experience of using their own resources to meet their needs – adapting their homes to best suit their mobility, purchasing aids that make life easier or managing their personal monies to best suit their lifestyle – these are all things that people will have experience in. Therefore it is important that we don't confuse new human service terminology and people's everyday experiences. People and families tell us that Support Organisations explanations and confidence in the process is essential.

Initial conversations need to establish the basis of a partnership between the person, their family and the Support Organisation and should cover:

- Understanding the person's needs, goals and support requirements.
- The Support Organisation, its purpose, values and way of working.
- The range of options for Shared Management.
- The responsibilities that the person or their family have the resource, capacity and interest in doing.
- What the Support Organisation has the capacity to do to support the person and their family.
- How the Support Organisation can help the person and/or their family develop their skills and confidence in aspects of Shared Management.
- The ability to form a partnership and what this might look like.

Things to consider:

- Have a range of real examples of how people have approached Shared Management is vital – we all learn by understanding real life experiences.
- Have a conversation about all of the options within Shared Management is important and support the person and their family to decide which arrangement will best suit them and their lifestyle is a key area for the Support Organisation to assist with.
- Be open about what the Support Organisation has a reputation at being good at, to make sure people have the right information to choose the Support Organisation that will suit them.

It is vital that internal mechanisms to support the different approaches to Shared Management are in place, such as the ability to offer a book keeping service or the necessary policies and procedures for people to be a genuine partner in recruitment.

“ being real and honest – we know when people are telling us rubbish, we can see it straight away – people don't need all the theory, you have to be practical and personable – that's what matters

Justin ”

Develop a Plan and Outcomes

People will already have an individual plan outlining their vision, goals and what supports they need to achieve their goals. The plan will also provide for what supports are being funded. With Shared Management, the participant and the organisation will then need to undertake further planning together as to how the funded supports outlined in the plan will be implemented.

It is worth noting that good planning should aim to:

- Explore who the person is, what matters to them and what they want their life to be like;
- Identify what good support is for the person. If this means engaging support people – who are the right kind of people for this person;
- Understand what helps keep the person healthy, safe and well;
- Consider what the person wants to achieve in the future – their own personal outcomes;
- Examine what may be the best way for the person to use their funding to achieve their outcomes; and
- Decide on the best way to manage the budget and the tasks involved in the support– shared management being but one approach.

Planning helps people determine what the right kind of support is for them and how this support system could enable them to live their lives as they choose and support them achieve their own personal outcomes.

1. A little book about person centred planning, J,O'Brien and C,L O'Brien. Inclusion Press

Things to consider:

Planning about the shared management arrangement will form the basis of the Shared Management Agreement between the Support Organisation and the person and their family. It will provide some time and space to think about what is involved in managing support and thinking through the tasks.

It is important to note that no matter the size of people's budgets, money isn't the only answer for getting a life – it's only one part of the solution. For many people looking beyond paid support is an important way for the person to have a rich and meaningful life which involves family, friends and local community resources.

Many people benefit from hearing about other people's experiences and ideas – peer support can be a significant resource to people and families. Investing in peer support is not only a useful approach but also a respectful one
– respecting people and families as experts and as valuable to others with similar experiences.

“ All the staff are my son's age and have similar interests to him as well as friendship networks that seamlessly include my son in their lives (with invisible and highly skilled support from his staff)

Parent ”

Understand the Budget

Shared Management's success is based on an **honest and open partnership** with people and families, where they know their allocation of funding and how it can be used.

All people, regardless of whether they manage their own funding or not, are entitled to know how and where their funding is being spent.

An annual budget reflecting the income and expenditure related to individual support funding component should be developed and be readily accessible by the person.

The Individual's Shared Management Budget should include the following elements:

Individual Support (direct care) Component – the component of the individual's funding allocation that is provided to purchase support. This may include payments related to engaging their support workers, taxation, workers compensation, superannuation, advertising and recruitment. It may also include the provision for purchasing supports such as equipment or transport, depending on the Funder's guidelines.

Organisation Support Component - the component of the funding that is allocated for the Organisation to cover all non-direct support costs such as general administration, program management and reporting. The Funder includes the Organisation Support component in the individual funding allocation as an additional amount to their direct support allocation - it is not intended to be used for direct support.

Regular budget updates - the Support Organisation and the individual should agree on the timing and amount of information to be included in budget updates. This way both parties can track income and expenditure.

Annual budget review – the Support Organisation and the individual should review the individual's budget and expenditure at least annually.

Things to Consider:

- Understand and ensure the individual support funding allocation enables people to get the most out of planning their budget.
- Have a responsibilities agreement between the individual and the Support Organisation outlining who will be responsible for what tasks will help people to plan well, make good decisions and helps keep a clear agreement between the Support Organisation and the person or their family.
- Have suitable and appropriate accounting systems to help people to stay in control. To make it as easy as possible, it is advisable to consider the following:

For all people:

- Support Organisations to provide regular budget reports to individuals and families so they can keep track of their budget.

For people managing their own funding and supports:

- Person and / or family member to have a separate bank account for the funding.
- People and families need processes to keep a track of payments made to supports (an Acquittal Book would be useful for most people).
- The Support Organisation needs a financial system that records payments made and acquittals received to and from people managing their own funds.
- People and families and their Support Organisation to agree on an acquittal process between the person/family and their Support Organisation.
- If the person and/or family are the employer they need to know and understand their responsibilities as an employer.

“ It is clear to me that we find and manage staff and our Organisation manages the paperwork and administrative bits. They negotiate very generously with us to work the whole thing to suit us. E.g. When we purchase things or services for our son we just send the receipt or bill to our Organisation who ensures it is dealt with appropriately. ”

Parent – Shared Manager

Develop a Shared Management Agreement

A Shared Management Agreement is a signed document between the person or their family and the Support Organisation outlining both the Support Organisations and person's agreed responsibilities in relation to the shared management arrangement. This would include how the person is going to spend their budget and how this will be managed and monitored.

A Shared Management Agreement is developed in the context of the person's plan and their desired outcomes. The agreement focuses on the person or their family's capacity and interest in undertaking particular management and co-ordination tasks, as well as the Support Organisation's capability to undertake their agreed responsibilities. It documents the agreed responsibilities of the person and/or their family and the Support Organisation such as:

- How and who will make decisions and how will differences of views be worked through?
- Who will be the employer of any support people?
- Who and how will any contractors or goods be purchased?
- How the employees will be paid and who is responsible for making the payments and managing the taxation and any other employment related requirements?
- How and who will be involved in recruiting and selecting support people?
- How and who will train support people in their work?
- Who will coordinate rosters?
- Who will direct people of what is required on a day to day basis?
- What are the emergency and back up arrangements and who is responsible for these?
- How will staff be supervised and supported and by whom?

- What safeguarding and accountability measures will be in place? For example, the level of contact between the person and the Support Organisation.
- How will problems with support people be resolved and who will assist with this?
- Who and how will person and/or their family be supported by the Support Organisation to undertake the things they agree to?
- How will the agreement be monitored?
- How the person or the Support Organisation will terminate the agreement
- When will the agreement be reviewed?

The above list is not exhaustive and it is important for each Support Organisation to check this against their Funder's policies.

Where the person chooses to employ their own support workers directly, it is important that they know and understand that they too have a responsibility to comply with the Funders' policies and the legal responsibilities associated with employing people. It is key for Support Organisations to help make this as easy and accessible as possible.

Things to consider:

Keeping the Shared Management Agreement simple and straightforward is vital to show clearly what the person is responsible for, what the Support Organisation is responsible for and how they will work together in the future.

Developing approaches to supporting decision making i.e. being clear about who makes certain decisions and how people are supported to be part of decision making is important. This helps to lay foundations for any times of disagreement in the future.

It is important that the Support Organisation assists the person and their family to record their spending against their budget to ensure they have adequate records if and when required by the Funder.

It is important that the Support Organisation supports and informs the person and their family on relevant legal and regulatory responsibilities associated with engaging their own support persons.

The Shared Management Agreement may be shared with the Funder during an audit process.

“ The shared management person in the organisation knows what I have to do and what they have to do – I have a good relationship with them and will call them if I have any problems – this is what we worked out together - it works.

Justin ”

Legal and Regulatory Considerations

There are a number of legal and regulatory implications that need to be taken into consideration when developing and maintaining a Shared Management arrangement.

There are five main areas of consideration:

1. Taxation
2. Superannuation
3. Industrial Relations
4. Insurances
5. Health and Safety

Further Information

Detailed information on each of these areas of consideration can be found in WAiS Engaging Your Own Supports booklet. One to one support as well as information and education workshops can be provided. If you are still unsure of an individual situation, it is advisable to seek legal advice, where required. As WAIS is attempting to undertake a co-ordination role for the benefit of the sector, you are encouraged to please contact WAIS to share any legal advice sought.

WAiS is coordinating a suite of private rulings through the ATO to clarify taxation and superannuation implications of the spectrum of Shared Management arrangements. These are significant efforts being undertaken and you are encouraged to please contact WAIS for further information or share any information you may have that may assist in its efforts.

Any relevant legislation, regulations, rulings and determinations will be housed on the WAIS website for easy access and referencing.

Organise Supports

People and their families with their Support Organisations begin their agreed tasks and responsibilities and the supports organised to live their life, their way.

It is important that Support Organisations consider this as their most intense time, maybe offering additional help to people and families to help them get going on their tasks. Obviously this is not the case for all people, however most people learn by doing, so a guiding hand initially can assist people in the long term.

It is at this time that **building a good relationship** is essential. We know that people and families value openness, flexibility and a willingness by Support Organisations to help should things not go entirely to plan.

A key role at this stage for Support Organisations is to assist people to implement and enrich their support plan. This may include being available to act as a sounding board, providing resources, information and advice, and working through challenges and problems that may arise.

If the Support Organisation is employing support persons directly then involving the person and their family in recruitment, will undoubtedly pay off in the long term by making sure that regardless of who is managing, the individual has a say. Person centred recruitment² is one way of recruiting people, based around the persons interests and dreams for their future.

If the person or their family are employing support persons directly then the Support Organisation could support them by providing information and advice on best practice principles in the recruitment, selection, engagement, training and management of support persons. Associated financial and monitoring systems may also need to be set up with the support of the Support Organisation with information provided as to what the applicable legislative and regulatory requirements and processes (see Legal and Regulatory Considerations section)

2. Individual Service Design, Fulton and Kinsella, Paradigm

Things to Consider:

Peer support can be hugely valued at this stage as people with experience of directing their support pass on their advice and tips to others. Support Organisations facilitating and supporting peer networks, can further assist people to get the most out of their arrangement.

In remembering the principles surrounding Shared Management, it is important that the Support Organisation doesn't take over, but be the safety net so people know they can come back to it should they need it.

Training can play a pivotal role in developing and maintaining quality support workers. Support Organisations providing a range of training options can be valuable, as can resources that help with managing, supervising and learning from team members directly.

“ Now that we have done this for a while, we even think that full management may be in our grasp in the future. At the moment we have all the freedom to be creative.

Parent ”

Reflect and Learn

Good Shared Management arrangements work to keep each party up to date as the person lives their life with their own support system – learning and evolving as ‘we’ go. However taking time to create a space to reflect on what the person and Support Organisation have achieved is crucial – not only to acknowledge progress but to also learn about what is possible in the future.

Support Organisations can play a crucial role of a critical friend in assisting the person and their family to reflect on what’s worked well and what needs to change. This is a very different approach to the traditional review process.

Reflecting on people’s original personal outcomes are a useful measure to explore how the support system has worked for the person and can generate ideas for future outcomes and strategies.

Whilst it is critical to mindfully maintain on-going dialogue that helps people reflect on their support it is also useful to create a real space in time to reflect and learn.

Where things are not working - they can be changed, in partnership with the Support Organisation and the relevant Funder.

Things to Consider:

Assistance to continually explore new opportunities can play an important role for people as their support develops and evolves.

Regardless of how the support system is developing it is vital that people and families are acknowledged as the experts and partners in finding solutions.

People and families value useful, simple tools or processes that ask appropriate questions to assist in their thinking about what's possible. Additionally being kept up to date with new and evolving community resources can also help to build new ideas. Support Organisations developing useful processes and conversations that help people to reflect on the success, understand the failures and build upon the possibilities are useful and valued resources.

It is common for people and families to increase their responsibilities and decrease the Support Organisations responsibilities, as they learn about what's involved in Shared Management and their confidence increases. The reflection stage is an ideal opportunity to explore this.

“ Best thing I ever did was to manage my own supports.

Brian ”

Glossary of Terms

Funder – A Government body or statutory authority that provides funding for people seeking supports and services.

Self Directed Support – Based on the premise that people are in the best position to define their support arrangements whereby the individual is in the centre of decision-making and in control of their supports and services.

Support Organisation - An organisation that has been approved by and meets a funder's eligibility requirements to provide supports and services to individuals.

Individual Funding – Funding assigned to a person for supports and services.

Shared Management - An agreed sharing of supports / funding management responsibilities between the individual and/or their family and a Support Organisation. Please go to the Understanding Shared Management section for a diagrammatical overview of the Shared Management spectrum.

Resources

The following resources are an example of what can be found on the WAIS website (www.waindividualisedservices.org.au), for your reference:

Policy, Legislation and Awards:

Shared Management Policy, Disability Services Commission, November 2011

Industrial Relations Act 1979 (WA)

Minimum Conditions of Employment Act 1993 (WA)

Fair Work Act 2009 (Cth)

Taxation Administration Act 1953 (Cth)

Superannuation Guarantee (Administration) Act 1992(Cth)

Social Community Home Care Disability Services Industry Award 2010

Tax Ruling 2005/16

Superannuation Guarantee Determination 2005/1

Australian Taxation Office (ATO) forms and other documents:

Registering for Pay As You Go (PAYG) withholding form (NAT 3377)

Tax File Number Declaration form - sample (NAT 3092)

Statement by Supplier form (NAT 3346)

Fact sheet for householders regarding PAYG withholding (BUS18937 NAT3901102011)

Please note that as additional resources come to our attention, they will be uploaded to the WAIS website.

Updated as at June 2017

Please ensure you check the WAIS website www.waindividualisedservices.org.au for the most up to date version as this is intended as a living document regularly updated and improved.

