PEARLS OF WISDOM

Plan and prepare: the change to self-direction

Narissa Wilson live in a small town on Queensland's Sunshine Coast. She has been directing her own support for over five years.

Making the decision that I wanted more for my life was the first step towards self-direction. I was frustrated and felt boxed up by traditional service boundaries. I knew I needed more flexibility and creativity in my life in order to achieve my visions.

In the beginning of my self-directed journey, I became overwhelmed by all the 'bits' and 'information' I needed to know, find or develop. I soon realised this was not a journey that was flown solo. I recognised that there were key people in my life who were also personally invested in my self-direction, such as my mother and father, partner and close friends. In their capacity as family and friends these people were already assisting me with the information and new knowledge needed in this self-direction world.

Despite all this, through conversations and meetings I had with family and friends to discuss my move into self-direction, I realised that no progression was really being made. There was a whole lot of talking but not much doing. I felt we needed a checklist, specific tasks and goals to work towards! I broke my journey into four distinct phases and this assisted me to then break each phase into small achievable tasks.

The following four tables show a brief version of the plan I use to keep my self-direction work on track:

1. Planning for my Self-Direction: *Planning my vision underpinned by my values and goals.*
2. Designing the look of my Self-Direction: *Thinking about and investigating how the business of my self-direction will meet my vision*
3. Building my Self-Direction: *Getting to work*
4. Maintaining my Self-Direction: *The day to day reflections and work over time.*

I still use these phases continuously, even now, five years into my self-direction, as they are adaptable and help clarify my goals and make them achievable. The phases are often revisited when my goals take a different direction.

The full version of these tables I used were on an Excel spreadsheet that was accessed live through the web by everyone in my network. To see the full version with how I completed each section click here.

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Planning for my Self Direction

GOALS	TASKS	RESPONSIBILITY	COMPLETED BY
Making the decision to self-direct	Yes! I want to self-direct.		
	Research into the requirements		
Meeting with Key People in my life that is invested in this.	Proposing the idea of self-direction to them and showing them my research.		
	Generating their support.		
	Developing a working team – who is committed to help me with this project?		
Choosing the Host Provider Model	Researching a host provider that aligns with my values.		
	Proposing the idea: Having the conversation with the host provider "I want to self-direct".		
	Generating the support for the host provider		
Strategic Planning *(Vision, Values, Goals)*	Inviting key people through conversation, telephone, email etc. who are committed to assisting me with this self-directed journey to meet and discuss my vision, values and goals.		
	Organise a meeting place – 'get together' and food *(6 – 8 hours of discussion or 2 meetings)*		
	Strategic Planning Meeting		
	Documenting (typing up) notes from meeting		
	Sharing strategic planning notes with key people: *family, people assisting in the self-direction journey, host provider, department and existing support workers (if relevant)*		
Support Plan & Needs	Revisiting or develop support plan (ie. Staffing, Resources etc to meet needs)		
	Revisiting or develop support needs (goals, care needs)		
	Risk Management for support crisis		
	Create a Support Structure / Circle		
Communicate with Key People	Through meetings preparing existing workers for a cultural change to the self-directed model. *Updates etc on changes, provide opportunities for feedback, how will this effect workers?*		
	Through conversations with key people, communicate about the changes and added responsibility during the time of change		

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Designing the look of my Self Direction

GOALS	TASKS	RESPONSIBILITY	COMPLETED BY
Designing the Operational Responsibilities of my self-directed supports	**Creating a list** of expectations for Host Provider with regards to my Self Directed Operations. *(ie. What is it that I do and don't want to do)*		
	Contacting host provider to discuss expectations		
	Together with the key people assisting me, create list of roles, responsibilities and expectations for them and myself.		
	Documenting the roles and responsibilities of the host, key people and myself.		
Budget	Invite key people to attend a budget meeting		
	Budget Meeting - Reviewing past, Planning New Budget to align with needs & goals with consideration to crisis – risk management		
	Writing up 2014 Budget		
	Sharing budget with *host provider*		
Designing Financial Responsibilities	Clarifying Financial Questions		
	Reading & Understanding PAYG Responsibilities about with holding		
	Establishing Bank Accounts		
	Research and Development of Planning Systems & Procedures (eg. What accounting system should we use, how will pays be processed etc)		
	Engage a professional to assist with accounting setup if needed		
	Document the processes		
Designing Hosting Agreement	Contact Host Provider and discuss list of expectations		
	Discussion, Creative Paths around agreement		
	Host Agency to provide contract		
	Contract to be signed by both parties		
	Contract to be stored		
Thinking, Researching & Designing Operational Systems	***Information Storage:*** Designing a system that stores all operational data including sensitive information ie (electronically via a secure usb or online storage OR filing cabinet)		
	Employee Systems & Processes: Calendaring options for rosters, staff review forms, time sheets and process for pays, incident and injury forms, termination strategies, employing strategies, letter of reference templates		
	Scopes of Engagement/Contracts: for workers, preferred supplier forms, individuals		
	Engaging People: Designing strategies to engage people in accordance with strategic planning (goals & visions) ie. Engaging a recruitment service		

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Building my Self Direction

GOALS	TASKS	RESPONSIBILITY	COMPLETED BY
Financial	Register for PAYG #		
	Buy MYOB Package & Setup		
	Create timesheet document and process for workers to follow		
	Buy filing cabinet		
	Go to bank or online setup bank accounts		
	Payroll Process Setup + Payroll Summaries Process		
	Documenting Process for back up person to do		
	Setup of Financial Calendar		
	Super		
Human Resources	***Induction Pack for Workers:*** Tax File Number Forms, Employee Details Form, Induction Checklist, Super Fund Forms, Positive Notice Card Forms, Job Description, Manual Handling Information, Professional Indemnity and Insurance Information, Pay Calendar, Time Sheet, My Values & Visions, Privacy and Confidentiality, Social Media Policy,		
	Incident & Injury Forms & Processes: Develop form and give to workers		
	Team Meetings: Hold meetings with workers to answer questions etc		
	Manual Handling Procedures: Manual Handling documentation and routine		
Operational	Creating an availability form for workers (when they can and cant work)		
	Creating an on call log (documenting when workers cancel or call in sick for shifts – this documentation will help with future planning)		
	Strategic Planning Documentation		
	Hosting Agreements		
	Insurance Policies		
Direct Support	Creating handover notes for workers		
	Video care routine (optional)		
	Creating prescribed medications chart for workers		

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Maintaining my Self Direction

GOALS	TASKS	RESPONSIBILITY	COMPLETED BY
Financial	Payroll - timesheets fortnightly / weekly		
	Paying invoices fortnightly		
	Reporting to host provider fortnightly and quarterly on payroll and other funds spent		
	Paying super quarterly		
	End of financial year requirements		
	PAYG requirements		
	Maintaining MYOB Setup		
	Maintaining bank accounts		
	Budget meeting half yearly		
Human Resources	Reviewing workplace health and safety reports		
	Reviewing care routine at team meetings monthly		
	Maintain worker satisfaction through regular check ins, reviews annually and team meetings		
	Maintaining a working relationship with contractors such as: cleaner, recruitment service, etc		
Operational	Completing rosters monthly for staff and aligning support hours with budget		
	Maintaining on call log		
	Reviewing strategic plan annually		
	Reviewing host agreement annually		
	Reviewing insurances are up to date annually		
Direct Support	Reviewing worker hand over notes and prescribed medication charts daily or weekly		
	Reviewing and updating changes in care routine or needs.		