

## NBN Support Brokerage Training Framework

	Element	Content
1	<p><b>Understanding the history, aims, and principles of individualised funding and support brokerage.</b></p>	<ul style="list-style-type: none"> <li>• Origins and international historical development</li> <li>• Connections and contrasts with Independent Living movement, Direct Payments.</li> <li>• UK developments - In Control, SC white paper, Individual Budgets papers.</li> <li>• Common failings of social care -e.g. lack of information, control, choices; tendency of system to provide standardised solutions; bias against solutions that promote social inclusion.</li> <li>• Values and founding principles of IF systems: user control and self-determination; social inclusion and the rights of disabled people as citizens; systems transparency, role clarity; planning and support based on person-centred principles.</li> <li>• Sources of funding, and the Citizenship Model.</li> <li>• Allocation of social care funding to individual - options and comparative advantages.</li> </ul>
2	<p><b>Understanding the role of the broker</b></p>	<ul style="list-style-type: none"> <li>• Clarification of differences between brokerage as performance of <i>function</i>, and the <i>role</i> of broker.</li> <li>• Overview of tasks within role, and limits to role.</li> <li>• The broker (role) as someone providing service accountable to the person, free of divided loyalties.</li> <li>• Principle of delivering service to the extent and in the way the individual requires.</li> <li>• The tension between allowing the person to have control but also sustaining momentum.</li> <li>• Issues of risk and conflict; e.g. conflicts between individual and carers; conflicts between the individual's wishes and the broker's judgement of risk and benefits.</li> <li>• The position of the broker in relation to the system and the local community.</li> <li>• The range and depth of expertise of the broker: reasonable expectations and anxieties.</li> <li>• Regulation and support of brokers - general principles and options, with reference where appropriate to local arrangements.</li> </ul>

3	<b>Meeting the person, and their families/allies.</b>	<ul style="list-style-type: none"> <li>• ‘Setting the tone’ from the outset through personal manner.</li> <li>• Explaining the broker’s role</li> <li>• Establishing and asserting accountability to the person.</li> </ul>
4	<b>Agreeing a contract for brokerage services.</b>	<ul style="list-style-type: none"> <li>• Clarifying what is meant by ‘contract’</li> <li>• Issues that may need to be covered in the contract.</li> <li>• Putting the contract in writing.</li> </ul>
5	<b>Getting to know the person and their life.</b>	<ul style="list-style-type: none"> <li>• Principles of person-centred planning</li> <li>• Choice of participants in process</li> <li>• Basic concepts and processes</li> <li>• Basic techniques – ‘kitchen table planning’</li> <li>• Awareness of more specific pcp methods, e.g. ELP, PATH, PFP and when/how to access them.</li> </ul>
6	<b>Developing a plan to make their life more like the one they want</b>	<ul style="list-style-type: none"> <li>• Formal support versus informal/mainstream resources.</li> <li>• Researching service options and community resources.</li> <li>• Options for funding sources, and how to access them.</li> <li>• Weighing options in terms of desirability and feasibility</li> <li>• Assessing risks and building in safeguards</li> </ul>
7	<b>Converting the PCP into list of required resources (A Service Design)</b>	<ul style="list-style-type: none"> <li>• Service design as necessary starting point for service specifications.</li> <li>• Contracting with an agency versus employing p.a’s</li> <li>• Services that may be needed to sustain implementation, e.g. support coordination, payroll administration</li> </ul>
8	<b>Finding and working with community resources and informal opportunities</b>	<ul style="list-style-type: none"> <li>• Role of broker in developing community resources, and limits to the role.</li> <li>• Basic techniques in mapping and assessing community resources</li> <li>• Identifying potential informal support.</li> </ul>
9	<b>Finding and working with support service providers</b>	<ul style="list-style-type: none"> <li>• Developing a service specification</li> <li>• Items that may need to be covered</li> <li>• Role of broker in extending the range of support options</li> </ul>
10	<b>Negotiating with service providers</b>	<ul style="list-style-type: none"> <li>• Understanding the provider perspective</li> <li>• Negotiating with providers</li> <li>• Outputs from negotiations: service delivery plans</li> </ul>
11	<b>Preparing and costing the Support Plan.</b>	<ul style="list-style-type: none"> <li>• Characteristics of a well-presented plan</li> <li>• Choosing ‘first person’ or ‘third person’ style.</li> <li>• Technicalities of costing a plan</li> </ul>
12	Submitting and presenting the <i>Support Plan</i>	<ul style="list-style-type: none"> <li>• Clarifying and sustaining roles in meetings about the support plan.</li> <li>• Effectiveness presentation techniques</li> </ul>
13	Getting implementation started	<ul style="list-style-type: none"> <li>• Ensuring there is a viable plan for implementation</li> <li>• Options for oversight of implementation</li> <li>• Troubleshooting</li> </ul>
14	Saying goodbye.	<ul style="list-style-type: none"> <li>• Importance of ‘closure’</li> </ul>
15	Administrative issues	<ul style="list-style-type: none"> <li>• Accounting for time spent</li> <li>• Fee and expense rates</li> </ul>

<b>Additional elements linked to the training</b>	
16	<p><b>Accreditation/Certification</b></p> <p>Training providers may wish to issue provide certificates to participants who have met a required standard. In addition, the training may be linked to a local IF/IB programme to provide brokers approved to work as brokers associated with the programme. In either case, the training will need to –</p> <ul style="list-style-type: none"> <li>• Develop an explicit set of required knowledge and skills against which the competencies of participants will be assessed.</li> <li>• Explicitly identify how these competencies will be assessed</li> <li>• Identify opportunities beyond the training to strengthen and reassess knowledge or skill where competence is marginal or not demonstrated.</li> </ul>
17	<p><b>Mentoring/supervision</b></p> <p>Arrangement will need to be in place so that brokers starting to provide their services – especially as they begin this work – receive support and monitoring. This may include peer support as well as professional supervision. Where there is no one locally who can offer expert guidance, the local support arrangements may need to be backed up with an additional 'supporting the supporters' arrangement provided by approved sources</p>

**(Steve Dowson NDT/NBN 2006)**