

“we identify
new and
innovative
types of
working”

**increasing choice; mapping
the journey for brokerage**

learn about the challenges faced
in becoming an independent broker

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increasing choice: mapping the journey for brokerage

Since the publication of Putting People First (2007)¹, adult social care and support services have undergone a programme of radical change. With a focus on quality, outcomes and personalised choice, significant steps have been made towards enabling people who use services take greater control and influence on how their care is designed and how it is delivered. The Adult Social Care Reform Grant has funded some of the expected changes including 'a framework which ensures people can exercise choice and control with advocacy and brokerage linked to the development of user-led organisations'.

In collaboration with the National Development team for Inclusion (NDTI), Skills for Care London published a discussion paper (2009) which considered potential competence and training issues in the delivery of a brokerage service and the skill sets required in the development of this new role. Skills for Care leads on two core strands of the adult social care workforce strategy Working to Put People First (2009)² and will continue to support workforce redesign and transformation activities in 2010.

To continue this discussion and to assist local authorities and their partner organisations consider options for improving and developing the 'customer journey', the Coalition for Independent Living (CIL) were commissioned by Skills for Care London to develop two documents; this, the first, outlines the considerations taken by the individuals involved during the development stages and the personal impact of undertaking the training and becoming a broker.

The second document will provide directors, workforce development professionals, commissioners and user-led organisations with a detailed overview of the organisational hurdles CIL have overcome in developing their ideas, their model of brokerage, core training and the overall ethos.

1. http://www.dh.gov.uk/prod_consum_dh/groups/dh_digitalassets/@dh/@en/documents/digitalasset/dh_081119.pdf

2. http://www.dh.gov.uk/prod_consum_dh/groups/dh_digitalassets/documents/digitalasset/dh_098494.pdf

introduction

Coalition for Independent Living (CIL) is an independent social enterprise which was set up by disabled people to provide independent user-led brokerage. The first brokerage hub has been developed in Westminster with disabled people using individual budgets and self-directed support.

The starting point for the organisation was bridging the gap between the role of peer-support (disabled people working with disabled people) and social care professionals in an attempt to create genuine user-led brokerage.

Regardless of how experienced a disabled person may be as a peer supporter many feel there is a perception that such expertise is not given equal value to them as is given to social care professionals offering similar services.

Being described as a 'peer supporter' has the effect of saying 'this person is not a social care professional', and identifies the peer supporter as being in the same category as 'user' or 'patient' rather than as 'individual', 'expert' or 'professional'. The social and economic difference which is placed on these roles is real and palpable with peer supporters being poorly paid and under-valued by comparison with social care professionals.

Self-directed care, as the term suggests, involves 'self' management. The word self refers to the individual as opposed to any institution. The ultimate goal was to harness the experience and knowledge of 'users' and develop strategies and methods that can be passed on and shared through training, which would in turn, feed into the redesign of how social care services were being commissioned. Although guided by many of the same principles as social care and advocacy, brokerage is neither of these and it was important to develop a new broker role that complements but which is independent from social care and advocacy. For the purpose of these documents, independent user-led brokerage is defined as 'listening to what people tell you and finding a way to make it happen. It is seen as a facilitative exercise that shares expertise and knowledge between users and with user/consumer in order to empower the individual to actively self-direct and commission their own services. The main principle of independent user-led brokerage is self-determination in the shifting of power and control from funding agencies to individuals.

The aim is that this will allow users and carers to be trained to take on this new role as independent brokers, thus bridging the gap between them and social care professionals. This user-developed training determines the scope and nature of what is important to know and learn.

Those involved in the support plan brokerage training were asked to document their initial concerns, the journey taken to develop the CIL model, how it works in more detail and what it can potentially do to assist with the development of brokerage.

the issue

It is true that being a disabled person gives me a unique insight into the challenges and difficulties faced by disabled people. However, I do not subscribe to the idea that it is enough to be disabled and that being disabled automatically gives you the right to 'expert knowledge or expertise'. What being a user does, is provide me and other disabled people with an understanding of how it works for ourselves as individuals, but it does not necessarily equip us with practical skills to 'broker' for others. I am able to share my experience of directing my own care with others. I had developed some practical skills around self management that I wanted to share with others.

Being part of the action learning set, for the first time I recognised that I had acquired skills but that I was continuing to be treated as a 'user', to be constantly consulted with, rather than as a professional. My skills had not been qualified nor quantified. Much of the representative work I had been involved with did not allow me to demonstrate my abilities. There was no profession or role for what I did, so I was always a 'user representative'.



Support Plan Brokerage Training allowed CIL to use the skills we had and to demonstrate effectively our ability to support other users.

harnessing users knowledge and expertise

Being supported to participate and learn is a critical part of being involved and making a meaningful difference. We have to nurture expertise and like other professionals, ensure disabled people be held up to the same standards, especially if they want to be brokers.

getting trained

Initially we participated in several in-depth training sessions that ran over several months, delivered by different national organisations. The evaluation concluded that much of the training was high on theory but very low on practice. The training was formulaic relying heavily on methodologies developed by non-disabled people, clearly developed for a 'professional' audience like social workers, who practice within a particular context. Some trainers commented, to our surprise, that we were the first user-led group they had taught.

conclusions

We concluded that it would not be possible to broker services for individuals based on the available training. What was surprising was that there was very little evidence required from us to demonstrate that we had actually learnt anything on any of these courses some of which ran for five days consecutively at significant cost.

developing our model

We subsequently decided to develop a bespoke course that can be taught by disabled people but that could give both disabled people and health and social care professionals something that they could learn together (coproduction). Most importantly, we felt that if brokers were going to be able to charge for their services that they should be able to clearly demonstrate their competence. In theory, anybody could be a broker but a 'lay' broker could not be held up to professional standards.

Ultimately, the choice would be for the user or customer but I felt that customers would want someone who had professionally recognised practical skills alongside local and theoretical knowledge.

We felt that to equip people with the necessary skills required the development of an externally validated course. This was important because it could provide disabled people with professional recognition which employers and those already working in health and social care would value.

Providing people with an opportunity to develop skills and work with the awarding body was a big step for us as individuals and as an organisation. The course allows us to finally share the expertise and to transform ourselves from 'users' to 'experts and professionals' in our own right. The course is founded on a collective understanding of personalisation, thereby creating a new shared role for disabled people and health and social care professionals as brokers.

outcomes

Having participated in the training, I have been inspired by other people in the organisation to undertake a Preparing to Teach in Life Long Learning qualification. This will enable me to train the Support Plan Brokerage course to other individuals wanting to become independent brokers.

I will be working to develop brokerage capacity. Being able to provide a lead and support the development of new brokers is an opportunity that I am so very proud to have

I have been the chairperson of the local user-led organisation for four years. I have also provided advocacy and have been involved in representing users on many panels ranging from access to housing. Disability became a passion more by necessity than by design. Facing the barriers and challenges within the context of an organisation has helped to channel the daily frustrations that being disabled brings. Knowing that you are constantly championing change is a great place to be

the issues

There were a number of issues faced by disabled people wanting to become independent brokers;

- Working independently
- Training gaps and professional recognition
- Catering for different needs
- Getting professional development support
- Perceived threat to traditional health and social care roles

We had attended loads of training but to be honest at the end of it I still didn't have a clue how to do brokerage in practice.....all the theory is fine but you need to know how to do things

We asked CIL to help build a system that brokers, clients and professionals could use and most importantly something that would enable us to do our jobs as brokers

Our first challenge, in conjunction with disabled people, was to develop training that would be meaningful to them but that social care professionals could also use.

the change process

Working together through action learning provided the trainee brokers the opportunity to share and explore the issues they were facing as users of health and social care services and to use this experience to develop new skills in order to broker for others.

the skills gap

Identifying the skills gap was essential to developing bespoke training. The group felt that they wanted and needed training that provided practice-based learning opportunities. The training to be developed should allow for the theory to be put into practice.

The training gaps identified were:

- Differentiating between traditional care planning and person centred (support) planning
- Writing a support plan for disabled and older people with a variety of access needs
- Costing a support plan
- Writing outcome based on action plans
- Understanding how to access and procure services
- Code of conduct for brokers and setting up as an independent broker

The Support Plan Brokerage training developed by CIL has taken account of these gaps and provided opportunities for people to put their newly developed skills into practice.

gaining credits

Developing a credit based course allowed individuals to gain credits for each of the units they undertook, while allowing them to do the course at their own pace.

accommodating different needs

Ensuring course accessibility was important to us as an organisation, so that disabled people could demonstrate their expertise. Disabled people designed the assessments to be the minimum standards that they wanted brokers to demonstrate. Ensuring that there was a mix of learning and assessment methods is a key factor in ensuring that the course is accessible to different learners.

professional development support

There are many training methods. CIL provides ongoing support and commitment via an action learning approach to support the people we train. It was important that this mechanism was in place and that there was a route for independent brokers to increase their skills and share learning with each other via the CIL Regional Hub structure. Apart from training peer-brokers, CIL also developed and trained regional leads who could take on the responsibility of developing brokerage capacity across the region.

It was really important to me that there were some accreditation or qualification attached to this course

The organisation also has developed systems that could allow independent brokers to carry out their brokerage functions in a clear and consistent way. Together with the peer-brokers, CIL has developed a web-based portal that can be accessed by clients, professionals', providers and brokers.

Providing ongoing opportunities for action learning and coming together to share experiences has been invaluable for both brokers and the organisation.

The portal is fantastic; it allows me to do my job in a safe and secure way while keeping my client at the centre of it all

I was very tired of going to training where I would be given a certificate of attendance but nobody else in the professional world recognised my achievements

support plan brokerage: an overview

support planning training quick view

Programme objectives

Impart an understanding of support planning theorems

Equip with skills to perform support planning and brokerage tasks

Duration

5 days

Level

Three

Participant profile

Candidates want to become support brokers and complete support plan brokerage course

Assessment

- 4 essays
- Questionnaire
- Role play
- Project
- Written description
- Case study

Certification

Support plan brokerage



support planning training course outline

Unit title

Principles of support planning

Learning outcomes

Understanding of key principles, issues and questions underlying support planning

Understand the processes of writing a person centred plan and a traditional care plan

Be able to establish appropriate ground rules for facilitation of individual and group meetings

Understand appropriate conduct for a broker in facilitating a meeting

Unit title

Developing support brokerage skills

Learning outcomes

Be able to action a support plan developed through brokerage

Understand contracts used in support brokerage

Understand the main criteria against which an action plan would be reviewed

Unit title

Developing skills in writing a support plan

Learning outcomes

Be able to design and develop a comprehensive individualised support plan

Know how to conduct interviews with clients using a person centred approach

Understand how to access financial and other resources needed to self direct

Be able to devise a budget for a clients support plan

Understand how to transform the support plan to make it accessible to people with learning difficulties and or/disabilities

brokerage as a shared role

the perceived threat to traditional health and social care role

CIL is aware that the model of independent brokerage designed by disabled people may be viewed as a potential threat to some of the functions within traditional assessment and care management social care roles. It was important that people working within both social services and other social care contexts could undertake the training. It is critical therefore that the training is viewed not just as something for disabled people but as a tool and supported process to increase brokerage capacity and reflect new ways of working in partnership. We feel it is therefore important that brokerage be viewed as a shared role between disabled people and those working within health and social care.

moving forward

The training and the web-based portal are now being used in Westminster. More disabled people have signed up to be trained as brokers. We hope that this will provide genuine employment opportunities for individuals. We are also looking to train health and social care professionals alongside disabled people. This new mechanism of co-production aims to allow both health and social care professionals and disabled people to develop new skills together and to redefine their working relationship giving equal value to the contributions of all involved.

In summary, an effective system of brokerage is not just an element nor a stand alone component of a transformed self directed support and procurement model; the role is vital for ensuring that genuine choice and control is offered to each budget holder, ensuring people using services with the opportunity to develop personally and professionally, offering providers market development links, whilst addressing the development of meaningful, transformed working relationships between those commissioning, those receiving and those managing care.

For further information on the work of the Coalition for Independent Living

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web: www.c-i-l.org.uk

For further information on Skills for Care and the regional programme of activities for 2010

Visit www.skillsforcare.org.uk/london

To request a copy of the free 'Transforming Services; a guide to action learning', please email sfc.london@skillsforcare.org.uk or download the guide and case studies via the regional website.

I knew I wanted to be a broker for disabled people. I had gone through the process of doing support plans for people on the Westminster Individual Budget Pilot but I had no idea how I could expand this further



At first I was really scared about the prospect of working for myself but now I have had the training and the support and I know that my peer support network will always be there I know I'm not alone, I really relish the idea of running my own business



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