Succession Planning Tip Sheet 1

What will happen to Betty when I'm gone?

Thinking about what will happen to your family member when you can't be there to care for them is not an easy subject.

Many parents/siblings think about it even when their son/daughter is quite young! So, when they are adults, it is even harder to contemplate, let alone talk about. We put it off as we think "it'll be okay, I'll do it in a few years". The grey cloud hangs there and every time you think about it, it gets gloomier because it is scary, and because you don't know where to start!

With this series of tip sheets, we hope to provide your family with both the encouragement and information to support you to start somewhere on succession planning for yourself and your family member.

Starting the jigsaw

Succession planning is a complex jigsaw. Every situation is different and will form a different 'picture', because the jigsaw needs to be put together to fit the circumstances and the needs of the family/carer and person requiring care.

What are some of the many variables?

- A single parent/carer
- Other family members who want to take on a role
- No other family to take over any of the roles
- Health of parents/carers
- Level of independent living skills the person has
- Whether the person requires part-time care or 24/7 care
- A modified house that is to be left to the person
- Where the person currently lives e.g. in-home or out of home
- What the person is eligible for through the NDIS
- The fact that the NDIS is changing all the time and there is no certainty of types of support and funding

These variables and many more create a 'picture' that is both highly individual to each situation and complex.

Where to start?

Some important things to remember before we start:

- What is right for one family is not necessarily right for another
- You can learn from others but don't compare

Step 1. First steps

Find or buy a good notepad or exercise book. This will help you to keep all your thinking, notes, planning and actions in the one place.

Step 2. What do you want for the future?

Now think about your situation. Take your time and think about the big picture but not too many of the details yet. Start a list of what you would like and/or need to happen in the future for yourself or if a couple for you both.

You can't go on a journey without some idea of the direction, so it is your turn to think about what would work for you in the future.

- Do you want to have your son/daughter moved out in their 20's so you can be around and ensure it is all working okay?
- Is your family member already in accommodation but other areas are not in place such as finances and monitoring for when you're not around?

Step 3. What does your family member want for the future?

Planning for the future should be based on both what the person needs and what they would choose for themselves. This is balanced with what is 'important for' the person. This is called in the jargon being 'person-centred' and we will talk more about being person-centred. *(refer to Person-Centred Support Tip Sheet)*

Many individuals will have clear and specific goals. However, people with disabilities who have limited communication will often need a person-centred approach to gathering their preferences and goals.

We should try to capture this through interaction, observation, and conversations (verbal and non-verbal) what they prefer. This process may only result in a list of a person's likes and dislikes, including their preferences for how they prefer people to support them, such as familiar routines and calm environments. A speech therapist can recommend best communication methods to use.

Step 4. What are some first steps?

There are steps that you can do without talking to your family, but we would encourage you to start the conversation when you can. Too early can cause too much worry, however, too late can do the same to some extent. The benchmark is if a step or decision will impact someone, then the discussion should be started.

One tip for these discussions is to not ask people to 'take over'. Family and friends have probably seen you tired and busy managing everything, so this could have made them scared and potentially reluctant to take on roles. Before you have a discussion break down the roles into smaller ones first.

We will start with 'replacing you'

What are the roles that you currently fulfill for your family member?

Below are some for you to consider. You may be doing all of them or have someone else doing some, such as a Support Coordinator.

Now make a list of who is doing what now:

- Providing day to day support
- Monitoring safety and wellbeing
- Attending medical appointments and managing health
- Managing service providers and therapy etc.
- Involved in development of Support Plans with each service provider
- Advocating for them when needed
- Centrelink nominee
- NDIS nominee
- Maybe you are an Administrator (informal or formal) i.e. supporting them with managing their finances
- Supporting them with making life decisions

Then the task is to put your thinking cap on and start working out over time who or what you could do to replace yourself in this list.

Remember that this is not a quick task, but it will take conversations and time to complete. Other parents can also be a good source of ideas too.

Step 5. Other small steps to consider

If your son/daughter/family member is over 18 years of age:

- If you are the only NDIS nominee, then you may want to consider who you could ask to be a backup second person as a correspondence NDIS nominee
- If your family member is over 21 years and living at home, they can receive Rent Assistance from Centrelink. (Note: you only claim 'Board & Lodging' level not rent) If they do not receive this then you can apply online, as they'll need this payment when they go into accommodation.

- Important to keep promoting involvement in any choices, whether everyday choices, e.g. food, activities, holidays or bigger decisions
- Always look for ways you and staff can build and maintain independence skills
- If you haven't had a communication assessment in a long while, then get one to ensure that the most effective communication method and aids are being used. You may need to ask for funding for this at your next Plan reassessment if you don't have it now.

If your son/daughter/family member is under 18 years you can work on things like:

- Focus on building as many independent living skills as possible (This can widen the accommodation options in the future)
- Promote their involvement in making everyday choices for themselves, e.g. food, activities, clothing, outings.
- Intentionally get them involved in decisions *(refer to Supported Decision-Making Tip Sheet)*

- In their teenage years you can start talking to them (if they are able) about what they want to do and where do they want to live as an adult

More information

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