



manawanui

# Our Content Today

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- The Power of Freedom Report
- What is Self Direction in New Zealand?
- How it works
- The State of the Nation
- Self Direction as the future
- Why – a Human Rights issue
- Critical Success Factor - Technology
- Cost comparisons
- Outcomes



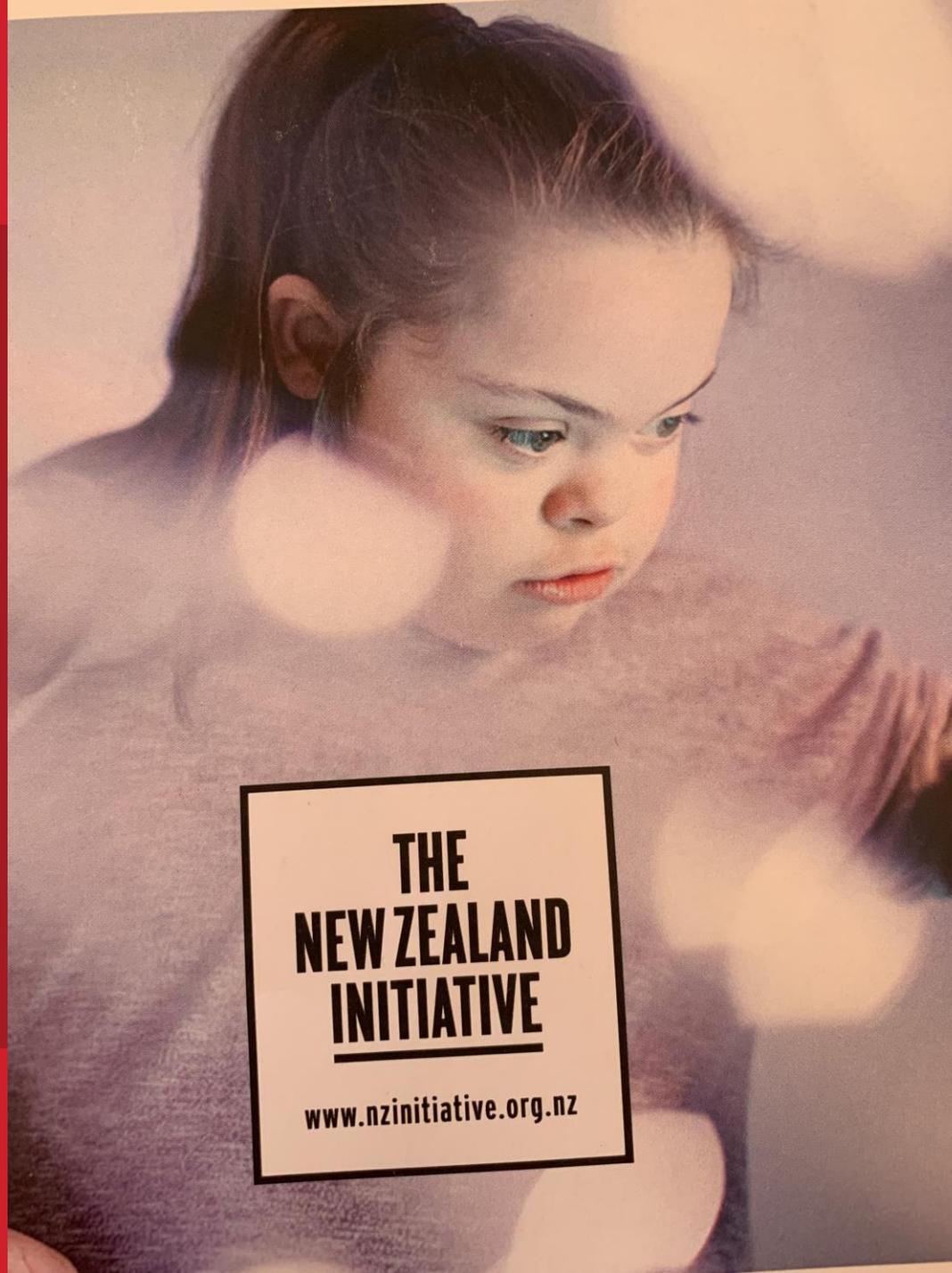
# About Us

We are the pioneer and leading facilitator of Self-Directed Funding in New Zealand

- Formally established in 2004 as a pilot
- Servicing 75% of the eligible market now
- Over 6,000 people supported to design and deliver their own services and be independent – self directed
- Over 20,000 support workers/PA's paid each year
- Over \$180 million dollars of government funding managed on behalf of our customers per year
- End to end digital solutions and tools to make self direction easy for all participants: end user, funder, providers
- Solutions that are scalable to support large numbers of people
- Full personal support functions to wrap around individuals who need more personal telephone or face to face options – as much or as little as required for each person



**The  
Power of  
Freedom**



**Self  
Direction  
in New  
Zealand**

# **The Power of Freedom Report:**

## **Content overview**

Origins of IF in New Zealand  
and Overseas

How it works

Comparing outcomes under  
IF and traditional models

Does it work?

“It’s the difference between night and day” Lisa Holten, Sarah’s Mum



“I don’t want a good life, I want an f\*\*\*ing great life!” Philip Patston

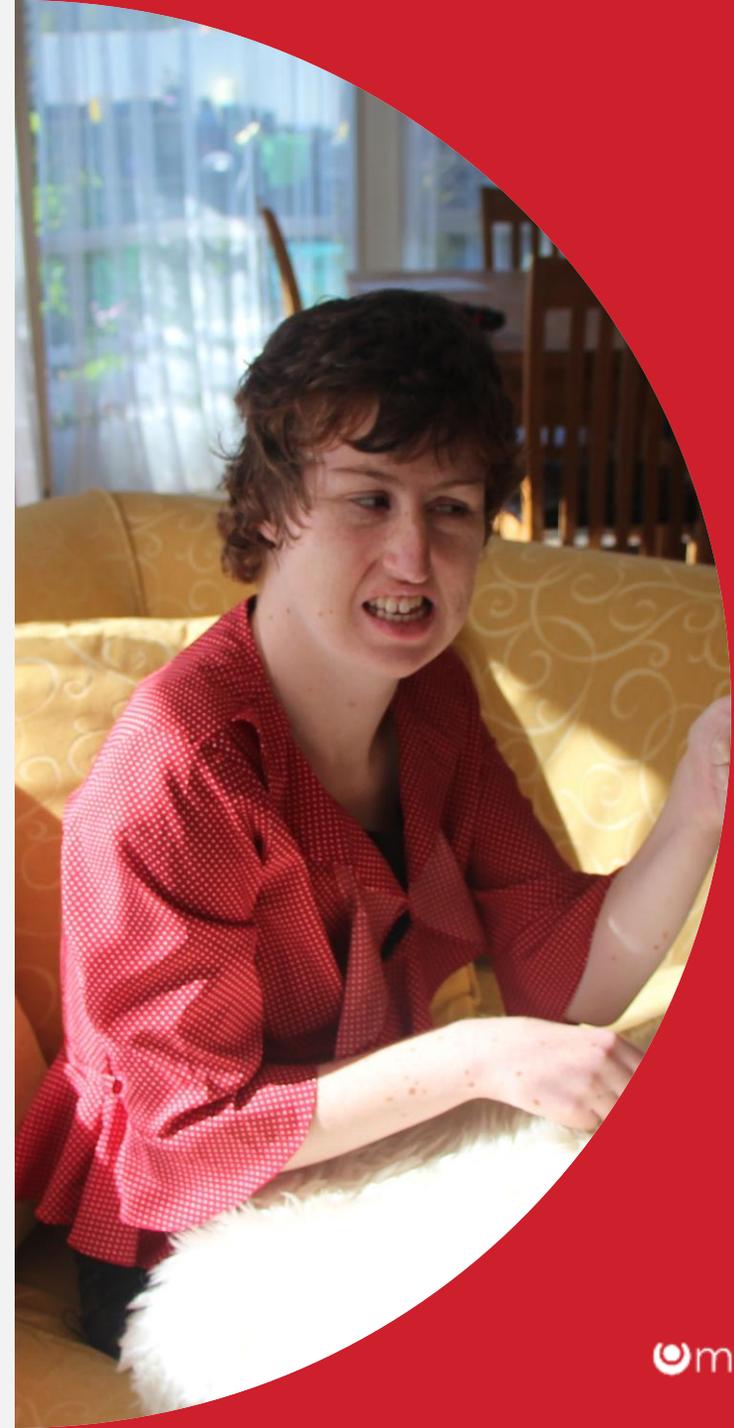
# What is Self Direction in New Zealand?



- Self Direction began from families demanding more control and choice
- It's about putting the control of resources in the hands of the individual who needs it – we believe this is a fundamental human right
- Self-Directed Funding recognises that we are all the 'experts' in our own lives – the systems we often are required to rely on ARE NOT!
- Shifting the concept to **Work with** NOT **Done to**
- It is transformational to people's lives in multiple settings and multiple demographics

# Benefits of Self-Direction

- It's all about Choice, Control & Flexibility
- “You get to choose who sees you naked everyday.” – Marsha, CEO.
- There's flexibility in how and when you use your funding
- You choose when and how support is provided
- Employees, Contractors, Businesses & Item Purchases – on your terms
- Greater personalisation to your needs
- **What choices match your needs?**
- **What do you consider when deciding your support needs?**



# Origins of Self Direction in NZ and Overseas



- Informally to meet individual demand in early 1990's (called Discretionary Funding)
- Pilot in 1998 in Christchurch – demand from disgruntled disabled people
- 2001 – Moratorium on further expansion of “Individualised Funding”
- 2004 – First formal “host” organisation – Manawanui was born
- 2008 – 130 people using IF with high satisfaction rate Parliamentary Committee review led to create a national framework and expand the scheme nationally
- 13 Host providers were contracted – 9 still operate as Hosts
- Demonstration projects started to further expand IF
- Growth has paralleled growth overseas

# How it Works

- The NASC (Needs Assessment and Service Coordination organisation) or Funder allocates funding to the person
- Manawanui sets up the customer in our digital systems and self-service platforms
- The person employs/contracts support staff or services or purchases disability support items
- The person sends timesheets and/or expense claims to Manawanui
- Manawanui pays the staff (or the person) and then invoices the funder or the Ministry of Health – payment is retrospective
- The funder holds funds, and customers access their funds by submitting claims for items or services purchased, or instructs Manawanui to make payments directly to support workers, which are then claimed back by Manawanui

**The person is the decision maker around how, when and who delivers supports, within the Purchasing Guidelines**





# The Process

Assessment and Allocation of Budgets for support



Host Provider onboards the person, and coaches them on the use of the funding



The person creates a plan for the use of the budget over (usually) a year



The person hires support staff and/or purchases services – and retrospectively claims against the budget through the Host Provider

# Purchasing Guidelines

- Purchases must be reviewed against 4 criteria:
  1. Makes your life better or easier
  2. It is a disability support
  3. It is reasonable and cost-effective
  4. It is not excluded or funded elsewhere



# Who uses IF currently in NZ?

The great thing about Self Direction is that funding can be used in a way that works best for any individual and their whanau.

We're always looking for new groups and communities who could benefit from Self Directed Funding and support.

We currently work with these groups already:

- Under 65, with a long-term disability (MoH)
- Over 65 with age related conditions (DHBs)
- Chronic Long term Conditions (DHB's - mostly medically fragile children)
- Those with vocational funding (MSD)
- Disability as a result of an accident (ACC)
- Some people with a mental illness (DHBs)
- Anyone who needs support in their home or community (fund themselves)

Nearly 8,000 people are using some form of Self Direction across the country - 47% of the currently eligible population



# Our Services: Making it easy

Payments processing

Online one stop shop Customer Portal

Mobile Smartphone Customer Portal

e-Mploy Job Matching Service

Schedular Payments

Digital Onboarding

Digital Workforce Scheduling

Customer Experience Centre

Employer protection & support

Health & Safety resources

Qualifications for employers and staff



# State of the Nation

- 25% of the New Zealand population identify as having a disability
- 1.8 billion of government funding to Disability Support
- 43,000 people currently supported with some kind of funding
- 17,000 people eligible for community based disability support
- 8,000 of those are using Individualised Funding and/or some form of self direction or personal budgets
- IF generally has a younger demographic (currently) and usually higher needs
- Nearly a quarter of Manawanui customers hire more than 5 support workers

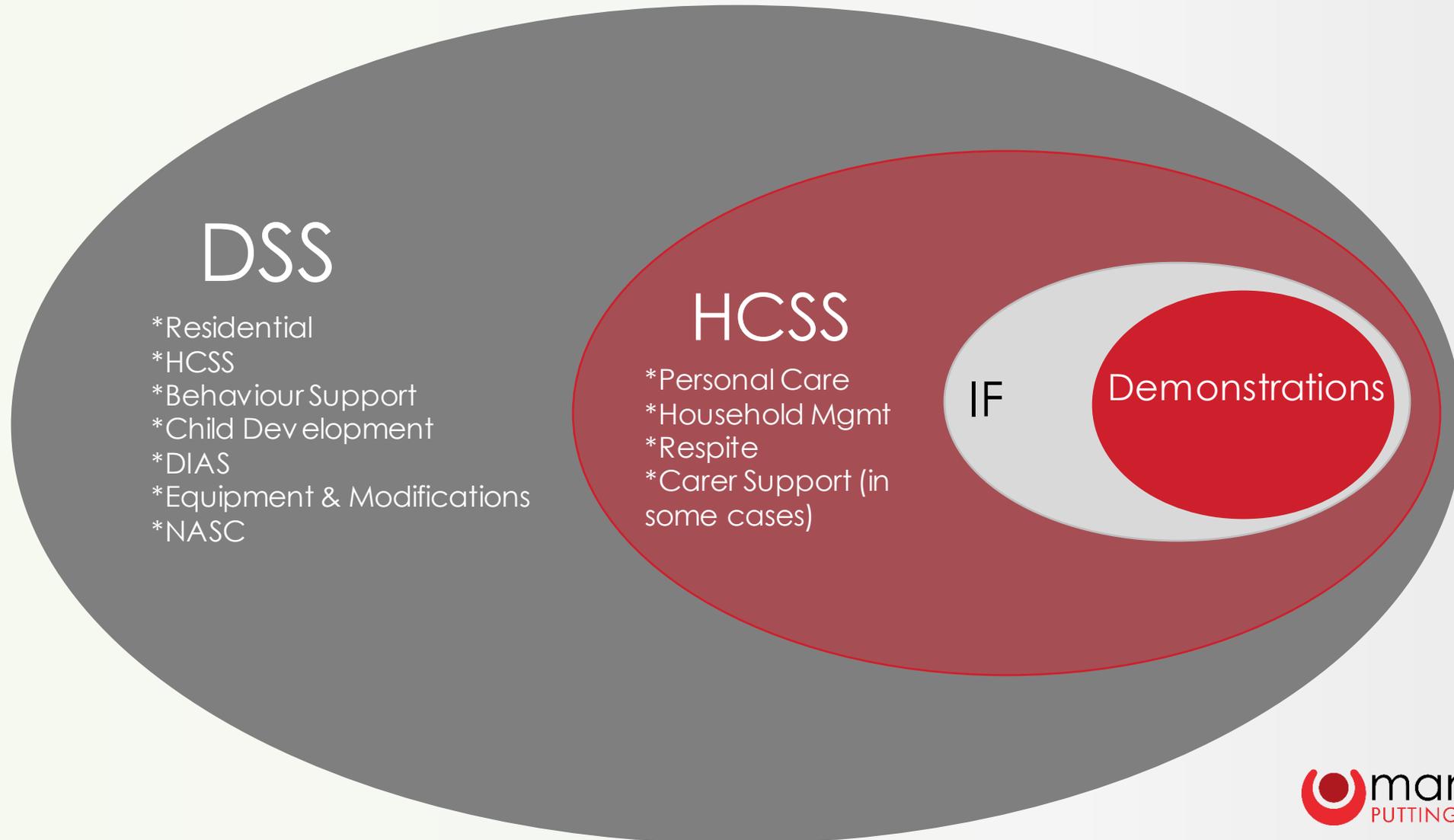
## Who funds disability services in NZ...



**MINISTRY OF SOCIAL  
DEVELOPMENT**  
TE MANATŪ WHAKAHIATO ORA



# Ministry of Health disability funding distribution





# The State of the Nation

**Announcing: A new Ministry for Disabled People!**

**Based on:**

- ✓ **Nothing about us without us**
- ✓ **Led by disabled people**
- ✓ **Enabling Good Lives vision and principles as the basis on which government supports disabled people across their lives**
- ✓ **Working in partnership with disabled people and ensuring a high level of trust and transparency**
- ✓ **Lifting the profile and visibility of disability across government**

# Enabling Good Lives Principles



- Self-determination
- Beginning early
- Person-centred
- Ordinary life outcomes
- Mainstream first
- Mana enhancing.
- Easy to use
- Relationship building

## IF (2004)

- MoH, DHB, MSD (limited access)
- Nationwide
- Majority of self-directed clients in NZ using IF
- PC, HM, Respite
- 13 IF Hosts – 2 national including Manawanui

## Enhanced IF (2010)

### Bay of Plenty

- Disability support only (no DHBs) Bay of Plenty only
- Initially less restrictive
- Wider definition of 'services' that can be purchased

## Enabling Good Lives

### Chch (2012)

- MoH, MSD, MEduc
- Demonstration finished
- Now uses Flexible Disability Support contracts (FDS)
- 8 providers have an FDS contract with limited success
- MoH manage

## Enabling Good Lives Waikato (2015)

- MoH & MSD
- Managed by independent EGL group with oversight from MoH
- Can have direct funding, use other providers or an IF Host or any combination

## Transformation (2017)

- Manawatu
- Led by disabled people
- Based on Enabling Good Lives principles
- Main focus on individualised and self-directed services and budgets
- Personal budgets in several iterations
- Currently underway with the objective of being rolled out across New Zealand under the New Ministry

# System Transformation



Mana Whaikaha

Enabling Good Lives

## Individually Arranged Personal Budgets

### **Direct funded**

Where the money is paid up front and the person purchases supports from a provider/organisation

### **Direct funded**

Where the money is paid up front and the person employs (or contracts) their own support workers

### **Assisted Direct funded**

Where the money is paid up front and the person engages their own supports with the assistance via a non contracted host arrangement.

### **Hosted Personal Budgets**

Where funding is reimbursive and goes through a host arrangement contracted to the Ministry

### **Flexible Disability Supports**

Where the Person is supported by a FDS contracted provider. The FDS provider organises all supports alongside the person and either provides the support or purchases the support on behalf of the person

# And...there's more

## **Centrally Arranged Personal Budgets**

Where the person has chosen to use a contracted provider to deliver contracted services.

## **Residual NASC Supports**

Where the person hasn't yet engaged with a connector and built a new plan

## **Other Centrally arranged supports**

These include specialist services and supports the Ministry always pays for such as EMS, Residential Services.

## **Immediate Resourcing**

Support to assist a person in crisis either purchased directly by Mana Whaikaha, or via a centrally arranged contract. for example additional HCSS, Respite

## **Early Investment**

Support purchased to assist a person achieve an outcome quickly that will make a significant difference in the person's life and probably save cost later

# Why Self Direction?



- **It's a human rights issue**
- The Social Model of Disability supports it
- United Nations Convention on the Rights for People with Disabilities – NZ is a signatory
- It's an issue of citizenship and participation in community life and society
- Outcomes are better
- People are happier and stay in their own homes
- Costs are lower

# UNCRPD Guiding Principles

There are eight guiding principles that underlie the Convention and each one of its specific articles:

- a. Respect for inherent dignity, individual autonomy including the freedom to make one's own choices, and independence of persons
- b. Non-discrimination
- c. Full and effective participation and inclusion in society
- d. Respect for difference and acceptance of persons with disabilities as part of human diversity and humanity
- e. Equality of opportunity
- f. Accessibility
- g. Equality between men and women
- h. Respect for the evolving capacities of children with disabilities and respect for the right of children with disabilities to preserve their identities

# Critical Success Factor: Technology

- The development of digital solutions that are easy to use has enabled us to support more people
- The basis for the technology is to make it accessible so anyone can use it and the person can manage everything independently if they choose to.
- All our digital platforms include a Web application, and a Smart phone capability



# Integrated End to End Solution



**“I don’t want a good life, I want a f\*\*\*ing great life!”**

Philip Patston was born after 48 hours’ labour on Christmas Day 1967.

His brain was starved of oxygen which left Philip with cerebral palsy.

Now 54, Philip employs staff for 30 hours each week using two PA’s.

Philip was one of the first people to receive an early form of individualised funding in the early 1990s.

Traditional services struggled to meet Philip’s needs.

In frustration, Philip told his NASC it was not meeting his needs.

Officials said they were not sure what to do.

“Give me the money and I’ll deal with it,” Philip said. And they did.

This was the start of Individualised Funding New Zealand



Let’s take a look...

# Web Portal - Statement

- Mimics your personal online banking
- Real-time data for accurate info
- Highly Secure and Accessible

NASC Review Date | 29 September 2019 ⓘ

Statement Date | 04/07/2019 ⓘ

Account Number: 204082  
 Client Name: Dom Test  
 Funds Allocated: \$19,779.50  
 Total Expenditure: \$1,720.00



Funding Remaining at 04/07/2019:

## \$18,059.50

Funding Period: 01/10/2018 to 29/09/2019

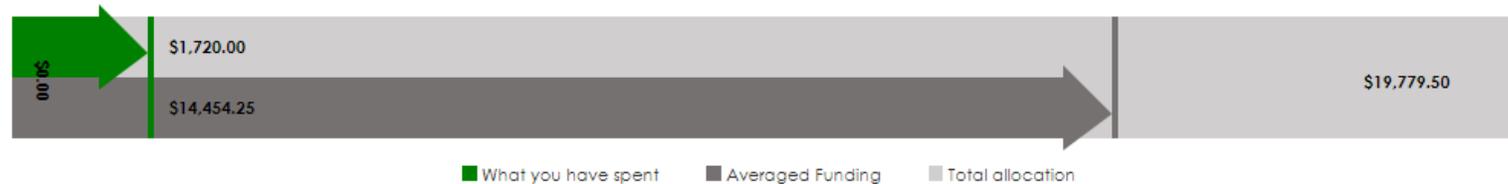


At your current spending, your allocation will support you through to your review date

There are 7 fortnightly payments remaining in your allocation period to 29/09/2019

You have been allocated an average of \$760.75 per fortnight and are currently spending an average of \$90.53

There is an average of \$2,579.93 remaining per fortnight of your allocated budget



### Total Expenditure for the Funding Period

#### Funding Period Expenses

Payments	\$1,660.00
MIC Service Charges	\$60.00

#### Funding Period Accrual

ACC Accrual	\$0.00
Holiday & Alt Hol Pay Accrual	\$0.00

#### Total Holiday Accrual

Holiday & Alt Hol Pay Accrued in previous period(s)	\$0.00
<b>Total Holiday Accrual owed to your employees</b>	<b>\$0.00</b>

Print PDF ⓘ

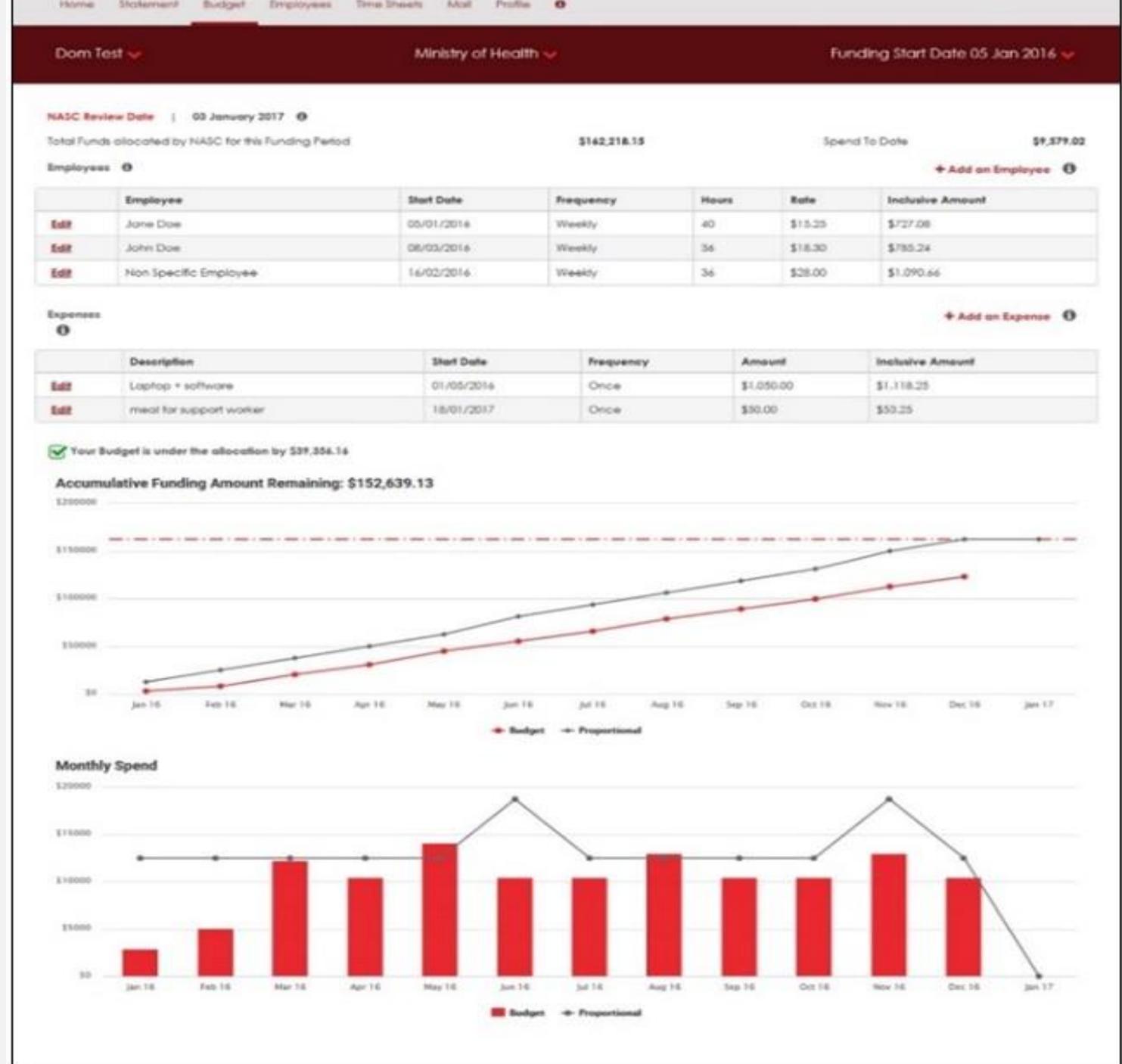
Download Word ⓘ

Show Details ⓘ

Show Graph ⓘ

# Web Portal - Budgeting

- Simple & effective budget tool
- Supports planning and maximise utilisation of budget
- Provides an important guide to spending for customers



# Web Portal - Timesheets

- Pay hours & expenses easily
- Allow Support workers to input their own time
- Ability to copy timesheets with consistent time and expenses

time ⓘ Add Time, then select the appropriate public holiday component + Add Time ⓘ  
if required for the "Labour Day" public holiday + Add Manual Time ⓘ

Person Supported ⓘ	Pay Component ⓘ	Mon 25 Oct	Tue 26 Oct	Wed 27 Oct	Thu 28 Oct	Fri 29 Oct	Sat 30 Oct	Sun 31 Oct	Mon 1 Nov	Tue 2 Nov	Wed 3 Nov	Thu 4 Nov	Fri 5 Nov	Sat 6 Nov	Sun 7 Nov	
Ian Draper (IF)...	Ordinary Hours Workec	0	2	0	2	0	2	0	2	0	2	0	2	0	0	×
Maria Test (IF)	Ordinary Hours Workec	0	0	2	0	2	0	2	0	2	0	2	0	2	0	×
Ian Draper (IF)...	Alternative Leave Take	0	0	0	0	0	0	0	0	0	0	0	0	0	6	×

Expenses ⓘ + Add Expense ⓘ

Person Supported ⓘ	Date ⓘ	Amount ⓘ	Expense/Payee ⓘ	Expense Type ⓘ	Particulars ⓘ	Hours ⓘ	Invoice ⓘ
Ian Draper (IF)...	27/10/2021	\$50.00	Expense	Purchases	lunch and travel costs		<a href="#">Attach</a>

Claim Id: 532048 + Send secure mail regarding this timesheet ⓘ  
Status: **New**  
[Audit Log](#)

Timesheet Notes + Add Note  
No Notes Recorded

Employer Notes + Add Note

Show All

Return Verify and Submit ⓘ Reject INSERT



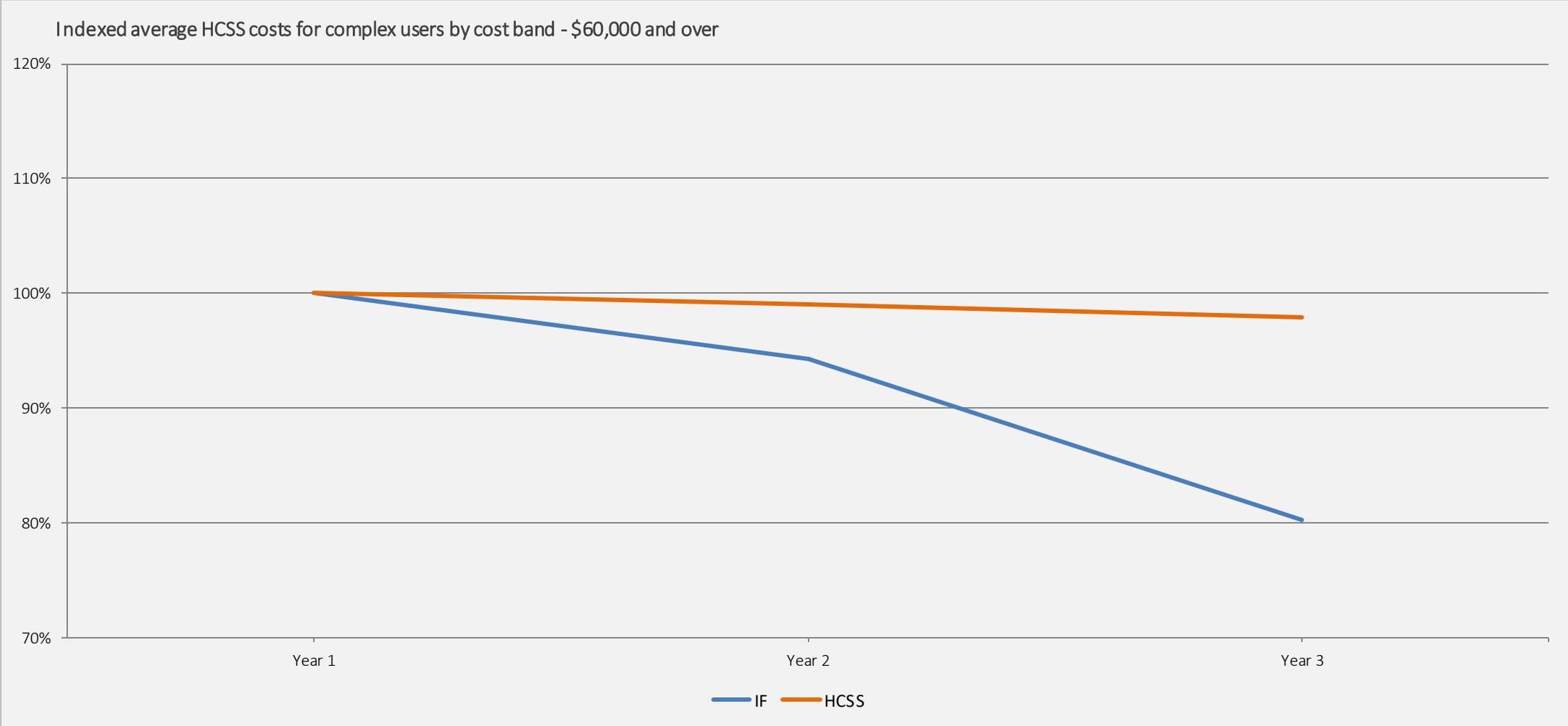
# Outcomes

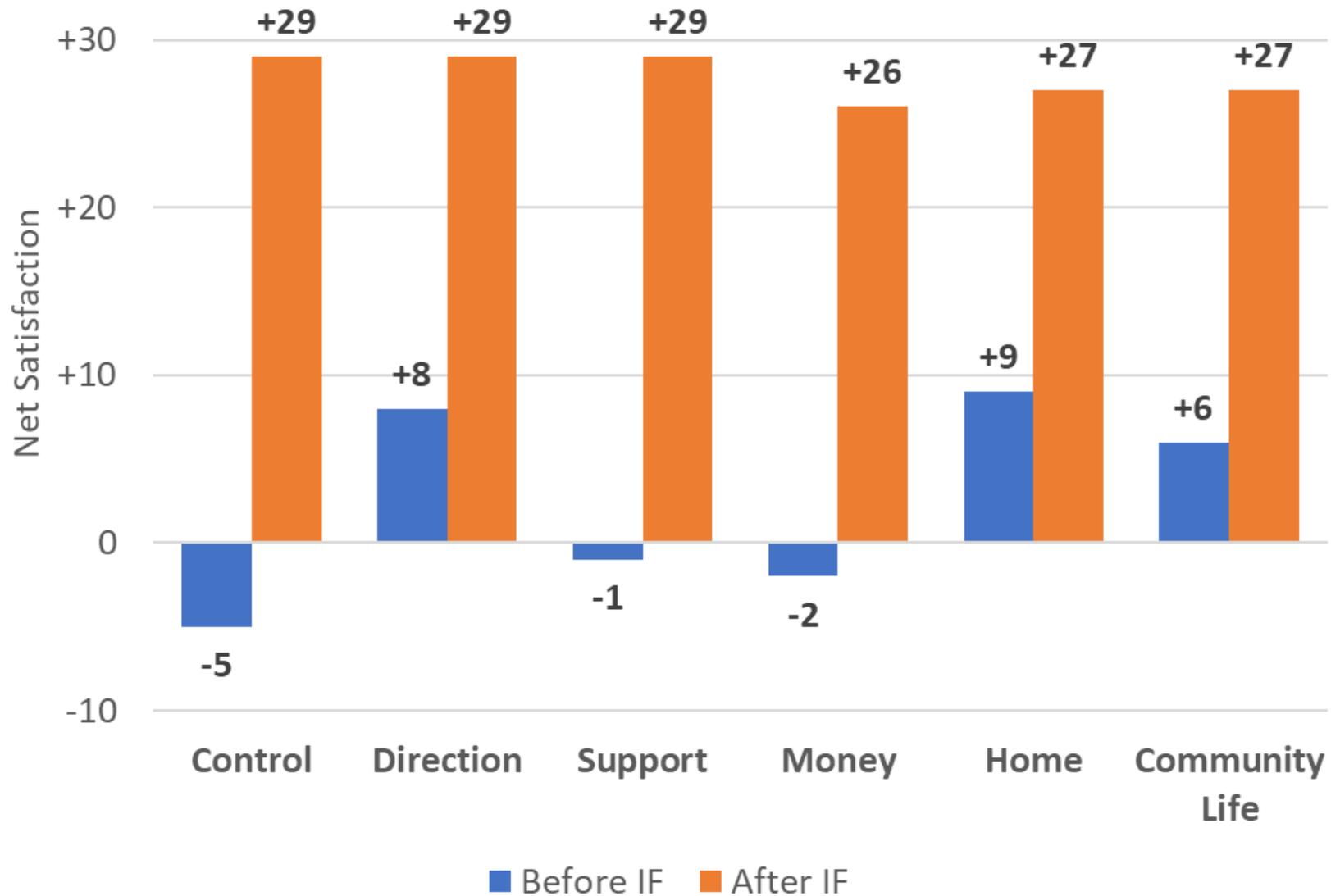
# Outcomes

	<i>Person with a disability</i>	<i>Family members</i>
<i>Consumer and family benefits</i>		
Met individual needs	Improved	..
Satisfaction with care	Improved	Improved
Sense of control over life/ empowerment	Improved	..
Community interaction (circles of friends)	Improved	..
Greater use of mainstream services	Improved	..
Quality of care/ confidence in care	Improved	Improved
Costs of supports	Down or no change	
Personal dignity	Improved	..
More independent living	Improved	
Abuse and neglect	Down	..
Satisfaction with life	Improved	Improved
Culturally and linguistically appropriate care	Improved	..
Providing care during non-business hours	Improved	..
Continuity of care	Improved	..
Employment and productivity gains	Improved	
Use of preventative care	Improved	
Use of hospital, other health services & residential care	Down	
Economic wellbeing	Improved	Improved
Health status	Improved or no change	Improved
More aids & appliances and home/vehicle modifications	Improved	

<sup>a</sup> These results are derived from the studies cited in appendix E. While they include studies from Canada, the Netherlands and Australia, they mostly relate to the Medicaid waiver self-directed funding programs in the United States and to direct payments in the United Kingdom.

# Costs





*Figure 7: Survey results for people who transitioned to IF under the UK 'In Control' scheme, 2003-2005*

**Most  
Importantly**



# Next..?

Building provider and system capability and capacity

Evolving authenticity

Staying on course despite the politics

Cross government funding and collaboration

Illustration of the impact

Keeping the person at the center of our work

**A NEW MINISTRY FOR DISABLED PEOPLE!!**



# Thank you Ngā mihi nui

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