

## Support Broker Job Description

**Purpose:** To advocate for adults with developmental and other disabilities to lead a self-directed life. We believe people with disabilities deserve the opportunity to direct their own supports while maintaining or improving their quality of life in their homes and in their community.

**Position Duties and Responsibilities:** The following categories are an outline of the job duties expected of the Support Broker.

**Planning:** The Support Broker is expected to initiate the planning process with the person and her/his team. A Person Centered Plan must be completed annually, at a minimum. The team will determine the type of Person Centered Plan that will be used. The Support Broker is expected to be well informed on a variety of person-centered planning tools. The Support Broker will coordinate the planning meeting, help ensure all key people have input, and document the planning session. A written copy of the Person Centered Plan will be given to the person and all interested parties, including the person's Dane County manager. This plan must be reviewed a minimum of every 6 months.

**Training:** The Support Broker is expected to complete all mandatory Support Broker training offered by the Support Broker Coalition and Dane County. Support Brokers may be required to attend information sessions throughout the year as a means of gaining resources and learning more about Self-Directed Services.

**Fiscal Responsibility:** The Support Broker is charged with informing the person and/or guardian with the choices available in Self-Directed Services. To accomplish this, the Support Broker must be aware of the State and Federal funding programs, both for personal funds and support funds, and how this relates to county funding. In addition, a broker should understand how an individual may blend their personal funds, family resources and public funding to help an individual achieve their goals. Paperwork related to this job duty must be completed within the necessary timelines. Support Brokers negotiate with support providers within a person's rate. Advocacy with Dane County may be necessary if a person's support needs change.

- **Knowledge of Personal Funds.** It is expected that all Support Brokers will have a clear understanding of SSI and SSDI benefits along with the knowledge of who is eligible for SSI-E. There must also be an understanding of how MA is related to personal funds and knowing who is eligible and appropriate for the MAPP program. The Support Broker must also understand the representative payee responsibility and make ensure all representative payees have the knowledge to follow through with job duties accurately.
- **Knowledge of public funding.** It is expected that all Support Brokers will have a thorough understanding of how County, State and federal funds work together through the waiver program. Accurately completing the assessment for the waiver program is a necessity. It is just as important to accurately complete the IFP, narrative and agreement/voucher forms in order for Dane County funding to be paid to support providers. The Support Broker is expected to review their Dane County funding statement from Fiscal Assistance with each client/guardian every three months.

**Communication:** The Support Broker is expected to have a minimum of monthly contact with one person on each support team. A face to face visit with each individual is required a minimum of once every three months in a variety of settings. Person-directed exceptions can be

written in the person's support plan. The County Manager will be informed of any crisis situations and/or any situational change that has occurred in a person's life.

**Mandatory Reporting:** Each Support Broker is required to be proficient in the Abuse and Neglect Policies provided by Dane County Human Services and the State of Wisconsin, and must follow this format for any suspected abuse and neglect situation.

**Paperwork/Documentation:** The Support Broker is responsible to complete a variety of paperwork for people to receive both Dane County Human Services and State of Wisconsin funding. This includes annual plans, fiscal paperwork, case notes, requests for adaptation modifications and DD system change form. All communication must be documented in a case note that details who the communication was with, what type of communication it was, what was discussed in detail, and how long the interaction was. The above protocol should also be used to document any administrative time spent.

**Knowledge of Community Resources:** The support Broker is expected to have an extensive knowledge of community and neighborhood resources. These include both paid and natural supports.

- **Housing:** It is expected that all Support Brokers will have a basic understanding of low income programs such as Section 8 housing, opportunities to purchase homes such as Movin' Out, Inc. Brokers don't generally take a lead in finding housing unless a client is moving between agencies and/or no residential agency is involved.
- **Community Connections:** Support Brokers must be aware of a variety of community activities which can strengthen people's social relationships, enhance people's community membership and increase their self empowerment.
- **Transportation:** The Support Broker is expected to have a proficient understanding of the transportation options in Dane County and how this service is funded. The Support Broker must be able to advocate for the appropriate transportation for each client.
- **Assessment and Referrals:** The Support Broker must be accurate in the assessment needs of each client. When a need is identified, the Support Broker must be able to make a referral to the appropriate person in order to get the need met. Examples of referrals are: Physical Therapy, Occupational Therapy, Psychiatrist, Communication devices, Neurotherapist, etc.

**Team Building and Conflict Resolution:**

- A Support Broker is expected to assist individuals in building and maintaining strong teams that help a person live the life they desire. Teams typically include a combination of family, friends and paid supports.
- **Conflict Resolution.** Each Support Broker must be proficient in facilitating team meetings when necessary. There also may be a need for the Support Broker to mediate conflicts in order for the team to find a resolution with a situation.

From: *Quality Standards for Support Brokers* – Introduction, p. 5 (December 30, 2005)