

Guidance Notes
for completing the New Directions
Benchmarking Tool 2015
Including Glossary of Terms
(For Non Statutory Service Providers)

What is the Benchmarking Tool?

The Benchmarking Tool was developed by the New Directions National Implementation Subgroup^[1] to support organisations to check their progress in implementing **New Directions, Personal Support Services for Adults with Disability** and in particular against the core values of Person Centredness, Community Inclusion and Active Citizenship and Quality, as per recommendation^[2] in New Directions.

These Guidance Notes will assist you to complete the Benchmarking Tool for your organisation.

Who should complete the Benchmarking Tool?

This Tool should be completed by HSE funded organisations working with adults with intellectual, physical and/or sensory disability and/or autism. It is a self assessment tool, to be completed by the Chief Executive Officer or equivalent post holder, on behalf of each organisation providing day services and supports to adults (18 years or over) with a disability. The Benchmarking Tool is not for use by organisations that only provide residential, respite or home support services. One Benchmarking Tool should be completed per organisation. It is not necessary to complete the Tool for each location within an organisation.

How to complete the Benchmarking Tool?

The Benchmarking Tool 2015 is in spreadsheet format and is designed to be completed in Microsoft Excel and returned by email.

It is divided into 2 Parts which are on separate sheets/tabs –

- Part 1 Profile of Organisation
- Part 2 Benchmarking of Organisation

Glossary of Terms: Please refer to the “Glossary of Terms” on pages 5 - 8 of this document *whilst* you are completing **Part 2 Benchmarking of Organisation**, to ensure you fully understand the terminology used in each statement and question. Terms which are highlighted in **bold** in the statements and questions are explained in the Glossary. For example, **Mission Statement** is highlighted in bold in Statement 1 and is explained on page 6 of this document. The terms that are explained are listed in alphabetical order. The Glossary of Terms was developed to ensure that there is a common understanding of the main terms used in the Benchmarking Tool. Where available, the definitions used in the Glossary have been taken from New Directions, Personal Support Services for Adults with Disabilities (2012) and the Draft Interim Standards for New Directions, Services and Support for Adults with Disabilities (2014).

Part 1: Profile of Organisation

Open the first sheet called “Part 1 - Profile of Org”. Complete the three sections in this part by inserting your answers in the open spaces provided as requested.

The first section asks for Organisation Details - Name, Address, Telephone, Name of CEO (or Equivalent Post Holder), Email Address and Number of Adult Day Service Locations.

[1] The New Directions National Implementation Group was set up by the HSE Social Care Division (Disability) in 2014 for Implementation, Oversight and Support of Services and Support Providers.

[2] New Directions Personal Support Services for Adults with Disabilities Chapter 9 Recommendation 2.

The next section asks for the number of people using day services and supports in the organisation, according to their Primary Disability. It is acknowledged that some people may have more than one disability. Please count each person under one disability category only, selected according to their primary disability.

The final section in this part asks you to insert the number of people using day services and supports under each of the Age Groups listed.

The TOTAL number of people recorded at the bottom of these two sections (Primary Disability and Age Group) will be the same.

Part 2: Benchmarking of Organisation

Next open the second sheet called "Part 2 - Benchmarking of Org". This part is divided into 6 sections:

Section 1 - Organisational

Section 2 - Person centredness

Section 3 - Community Inclusion & Active Citizenship

Section 4 - Quality

Section 5 - Demonstration Sites

Section 6 - Completion & Return Details

Sections 1 to 4 have a number of *statements* for your consideration to help you to evaluate your organisation's implementation of New Directions, using a drop down menu. Some of the statements also have an open space in the column on the right to elaborate on the response you give in the drop down menu, where appropriate (*see further details on the completion of these four sections below*).

Section 5 has a number of *questions* regarding demonstration sites in line with New Directions (*see further details on the completion of this section below*).

Section 6 asks you to complete who form is completed by and provides return details.

Sections 1, 2 and 3 - Organisational; Person Centredness; Community Inclusion and Active Citizenship contain statements about key features required by an organisation in order to implement New Directions.

These statements should be responded to by choosing 'Yes' / 'No' / 'Not Appropriate' from the drop down menu to correspond with your own evaluation of whether the feature is present within your organisation or not.

Some of these statements require you to give further details or examples in the column on the far right of these statements. Where this is required, it is indicated at the end of the statement. e.g. **Statement No. 4 – 'Please comment if required'**.

Section 4 - Quality has a number of statements about quality assurance measures that may be present within the organisation currently or that the organisation is working towards. Again please note that these statements relate to Adult Day Services and Supports only. Therefore, if your organisation has, or is working towards, accreditation for residential or respite services only, you should select 'No' for **Statements 21 and 22**.

Section 5 - Demonstration Sites asks you to identify and give brief details about a site which demonstrates change and reconfiguration in the last five years in line with New Directions in your organisation. You are also asked if you are willing to share this information/learning with other interested parties in the sector. If you indicate 'No' in **Question 25.6**, your information/learning will not be shared with other interested parties in the sector.

Section 6 - Completion & Return Details – When the first 5 Sections of Part 2 - Benchmarking of Organisation are completed, please insert Form Completed by, Position in Organisation and Phone Number of the person completing the form on behalf of the organisation and the Date of Completion.

Please check that there are no blank spaces on either of the sheets in the Benchmarking Tool i.e. that all sections have been completed.

Queries to New Directions National Implementation Office Tel: 046-9251315.

Please return completed forms to anne.melly@hse.ie
by close of business on **Wednesday 20th May 2015**

Glossary of Terms used in the New Directions Benchmarking Tool 2015

<u>Term</u>	<u>Meaning</u>
Accreditation	The system whereby an organisation can be certified as meeting the requirements of a standard in providing a particular service.
Active Citizenship	People taking a meaningful and active role in their own community, e.g. as a volunteer, a club member.
Advocacy Forum/Structure	A forum/structure to support people to speak on behalf of themselves (self advocacy) or others (peer advocacy) or to access an independent advocate if necessary about issues of concern within an organisation. Advocacy forums/structures are supported either by staff within or independent of, an organisation. Some advocacy forums/structures also lobby and use media campaigns and other methods to influence public opinion.
Barriers /Obstacles	The factors that potentially serve to exclude or restrict people from achieving their outcomes e.g. lack of rural transport, wheelchair access issues. Monitoring barriers/obstacles also provides a consistent framework for the service provider to inform future strategy.
Benchmarking	A continuous process of measuring and comparing services and supports against national policy and standards.
Community Inclusion	Community inclusion results from efforts on two broad fronts: first, service provider (organisations) and the community work together to insure that each individual has every opportunity to participate in community life, and to be valued for his or her uniqueness and abilities; and, second, the affirmative actions of community members – as individuals and in the organisations and associations that are part of any vibrant community life – to welcome people with disabilities into community life.
Core Values	The guiding principles that define how New Directions is implemented. They are Person Centredness, Community Inclusion & Active Citizenship and Quality.
Evaluation	A formal process to determine the extent to which the planned or desired outcomes of an intervention are achieved.
Format that is accessible	Information is provided in a format that has been adapted to an individual's needs and abilities (i.e. large print, pictures)

Key Worker	A member of staff, who carries particular responsibility for the person with a disability, liaises directly with them, coordinates their services and supports and acts as a resource person. Some service providers may use a different term for the key working role, e.g. mentor, support worker, life coach.
Mission Statement	A clear statement of intent reflecting the philosophy, aims and values of the organisation.
Natural Supports	People who are not paid but who provide assistance, feedback, contact or companionship to enable people with disabilities to participate in community life, e.g. social, education, training, supported living and employment opportunities. Examples of interventions to support the development of natural support are circles of support, peer support, volunteers and befriending schemes.
12 Supports	<p>The 12 Supports outlined in New Directions are as follows:</p> <ol style="list-style-type: none"> 1. Support for making choices and plans 2. Support for making transitions and progression 3. Support for inclusion in one's local community 4. Support for accessing education and formal learning 5. Support for maximising independence 6. Support of personal and social development 7. Support for health and well being 8. Support for accessing bridging programmes to vocational training 9. Support for accessing vocational training and work opportunities 10. Support for personal expression and creativity 11. Support for having meaningful social roles 12. Support for influencing service policy and practice.
Outcomes	The results or effects on a person of planned supports and services received. Measuring outcomes also provides a consistent framework for the service provider to review its performance and informs future strategy.
Parent or Carers' Forum/Structure	A structure for regular meeting of parents or carers, organised by the service provider for sharing of information and open discussion about subjects of interest.

Person Centred Planning process	A process by which a person centred plan is developed. The process supports and enables a person to make informed choices about what they want to do in the future and the supports they need to achieve a good quality of life and realise their goals. The person centred planning process should ensure that the individual services and supports provided to the person are responsive to his or her individual needs and wishes and focus on outcomes for the person, based on their goals as set out in the personal centred plan.
Person centredness	A set of beliefs, attitudes and expectations about the right and capacity of a person with a disability to live their life in accordance with their aspirations, needs and abilities. Person-centred organisations respect the strengths, abilities and resourcefulness of all people and their place in the community and society. When services and supports are person-centred, the Service Provider truly listens to and respects the choice that the person makes and tailors services and supports around those choices. The Service Provider uses creativity and flexibility to support the person to achieve his or her chosen goals. This may involve adapting existing supports and services to meet a person's needs and/or facilitating choices that are not limited to the options that can be offered within any one Service Provider's range of services. A person centred approach means having high expectations for the person and helping him/her to manage risks and overcome barriers/obstacles. Support for community inclusion, active citizenship and positive risk taking is integral to a person centred approach.
Person/People	The term "person" is used to refer to an adult with a disability who is being provided with support services. When more than one person with a disability is being referred to, the term "people" is used.
Person Centred Plan	A plan developed through a person-centred process, which supports and enables a person to make informed choices about what they want to do in the future and the supports they need to achieve a good quality of life and realise their goals. The person-centred planning process should ensure that the individual services and supports provided to the person are responsive to his or her individual needs and wishes and focus on outcomes for the person, based on their goals as set out in the person centred plan.

Positive Risk Taking	Positive Risk Taking is taking risks to achieve positive outcomes. It involves weighing up the potential benefits and risks of exercising one choice of action over another, identifying the potential risks involved, and developing plans and actions that reflect the positive potentials and stated priorities of the person. It involves using available resources and support to achieve the desired outcomes, and to minimise the potential harmful outcomes. It is not neglecting or ignoring the potential risks; it is a very carefully thought out strategy for managing a specific situation or set of circumstances.
Quality	Meeting the assessed needs and expectations of people by ensuring the provision of safe, efficient and effective management and processes.
Quality Assurance Body	A Body which measures compliance with a standard and which can thereby confer recognition of the quality of the service provided to successful applicants.
Risk Management	The systematic identification, evaluation and management of risk. It is a continuous process with the aim of reducing risk to an organisation and individuals.
Staff	The people who work in, for or with the organisation. This includes people who are employed, self employed, temporary, volunteers, contracted or anyone who is responsible or accountable to the organisation when providing services and supports to people with disabilities.
Statement of Purpose	Describes the aims and objectives of the service including how resources are aligned to deliver these objectives. It also describes in detail the range, availability and scope of services and supports provided by the overall service.
Strategic Plan	A time defined plan (e.g. a 5 year plan) resulting from an organisation's process of defining its strategy or direction and making decisions on allocating its resources to pursue this strategy.
Satisfaction Survey	A survey asking people what they think about different aspects of the service and supports they receive.