



The emotional and practical considerations for succession planning and the NDIS:

Planning for a time when you are no longer able to be a primary carer can be an emotional and stressful experience. However, starting the conversation about when you are no longer there to support the person you care for can provide both of you with peace of mind.

To assist, the National Disability Insurance Scheme (NDIS) can provide additional support staff within an NDIS plan to support family wellbeing. By submitting a Carers Statement at the planning meeting, you can highlight the personal impact of your caring role. For example, you may wish to return to work or study, take a holiday, go travelling or disclose an illness, all of which would reduce your capacity to continue caring.

By identifying your own needs, throughout the NDIS pre-planning phase you can enable the person you care for to gain greater independence. The NDIS will take into consideration the capacity of friends and family members, and may include additional support where unpaid caring hours are not being met, or where future needs are identified.

Social and emotional steps to consider

Acknowledging that you will not be able to provide ongoing future support and care, is the first step in putting together a succession plan. The following points outline some important first steps for consideration:

- Have the conversation. Talk with the person you care for so that you are able to understand their wishes and vision for the future. Include them in the planning as much as possible.
- Help them connect with a peer support network or participate in community activities to develop community connections. When transitioning primary care to another person, a strong sense of community participation can lessen the emotional impact.
- As the carer, you may wish to consider joining your own peer support group. This is a good way to connect with other people who may be going through a similar situation.
- You may wish to access a counselling program, which can offer emotional support and help you through.
- Consider speaking with other family members about their interest in and capacity to take on parts of the caring role. It is important, however, to limit your expectations around others' willingness to take this on.
- Have the conversation with the NDIA during a planning or review meeting. You can provide a Carers Statement or document your reduced hours of care in the material provided.



Practical steps to consider

You know best how to care for your family member or friend. Think about all the things required in order to provide the quality of care you and they would expect. Some examples may include:

- How does the person communicate their needs?
- What is the best way for others to communicate with them?
- Document the person's current daily needs that can help explain to the person/s who take over your caring role what is required. You can update these at any time.
- Document the person's details, such as Medicare, Centrelink, GP and specialist contacts. Where applicable, note the location of a parent's will or testament.
- Make notes of the person's likes, dislikes, favourite activities, people they enjoy being with, some information about their past, their strengths, their hopes and wishes, and what they would like to happen should you no longer be able to care for them.
- List the people you regularly have contact with – doctors, care workers, nurses, teachers, friends, caseworkers, psychologists, specialists, family members. Ensure you note their contact details and keep these up to date.
- Where possible, find out as much as you can about the potential future of the person you care for based on their health condition, psychosocial well-being and/or disability. Think about how you would need to adjust the care provided over time - for example, if they have a degenerative condition, they will most likely require adjusted care as their condition progresses.
- A person's goals, desires and ideas can change frequently. Regularly checking the information documented in the succession plan may help to ensure any changes are reflected.
- Ensure the Succession Plan is able to be modified when needed

There are some online tools available for parents, carers and people with disability which provide information and templates to help you and the person you care for tell your story, and share information about your needs with other appropriate contacts.

<https://myhealthrecord.gov.au>

<https://www.knowme.net.au/>

There are a range of financial and legal requirements that need to be considered regarding succession planning. For further information please visit www.carersaustralia.com.au, click on NDIS & Carers, and then helpful-resources.