**Making a Service Agreement**

If you receive individual funding, you have a number of options about how your funds are managed and who manages them. Whatever the funding option you choose, making a written agreement with the organisation that holds your funds will protect the interests of all the parties involved.

This is called a ***Service Agreement***.

A Service Agreement (an agreement) will make sure that you and your intermediary (or service provider) have a clear set of expectations of how your supports will be delivered and your funds managed. A good agreement will also list each party’s responsibilities and obligations, and explain how to resolve any problems if and when they arise.

When you are working on your agreement, you should take a copy of any support plan you may already have (for example, a Supported Living Fund proposal) to help guide the discussion. Your support plan will show what supports will be delivered, when, by whom, etc. Your agreement will explain the roles and responsibilities of managing your funding to pay for the supports shown in your plan.

Some things to include in your agreement:

* Your support plan showing the supports to be provided
* The cost of supports in your funding allocation
* How you would like your services to be provided
* How long the supports will be provided for
* When and how your agreement will be reviewed
* How you and your intermediary and/or service provider will deal with any issues that may arise
* What your responsibilities are in the agreement (for example, to be available for appointments)
* What your intermediary’s and/or service provider’s responsibilities are in the agreement (for example, to provide you with monthly financial statements)
* What notice is needed to end the agreement
* Anything else that you and your intermediary and/or service provider agree on
* Signatures

Following is a basic agreement template that you may like to use, or to base yours on, or your intermediary and/or service provider may give you one that they use.

Please note that you do not have to use the template provided. However, a service agreement should include the same details and type of information shown in the template provided. An agreement should be clear and easy to understand.

If at any point you are unsure about anything in your agreement, it is recommended that you talk to a trusted person (or nominee) to help you with reviewing your agreement before you sign it and give it to your intermediary and/or service provider.

**Service Agreement template  
for individual funding arrangements**

This agreement is made between:

|  |  |
| --- | --- |
| Service recipient’s name[[1]](#footnote-1): |  |

And

|  |  |
| --- | --- |
| Intermediary’s and/or Service provider’s name: |  |
| This agreement will start on | [day] [month] [year] |
| for the duration of / end on | [specify time period or end date] |
| Agrees to provide the following | [brief description of the supports] |
| **Complete funding details below as required:** | |
| The total annual funding is | $ |
| Total fixed term funding is | $ |
| Total one-off funding is | $ |
| *Detailed cost of supports are attached. [Please attach a document showing the supports with their individual costs].* | |

| **Intermediary’s and/or service provider’s responsibilities:** | |
| --- | --- |
| [insert funded organisation’s name]  agrees to: | [Insert any information about how you wish the organisation to work with you in the provision of supports. For example:]   1. Issue detailed monthly expenditure reports against funding; 2. review the service with you [specify a review period – e.g. 6 monthly] [[2]](#footnote-2); 3. treat you with courtesy and respect; 4. consult you on decisions about how your supports are provided; 5. work with you to arrange for supports that fit your needs and at your preferred times; 6. comply with the approved guidelines relevant to the funding; 7. listen to your comments and questions and resolve problems quickly; 8. keep and provide clear records on services provided to you. |

Complete section below (see suggested examples):

|  |  |
| --- | --- |
| **Service recipient’s responsibilities:** | |
| I, [insert name],  agree to: | [List what your responsibilities will be. For example:]   1. review, sign and return copies of monthly expenditure statements in a timely manner; 2. report any errors or inconsistencies in monthly reports without delay; 3. follow the approved guidelines of the funding; 4. work with [insert provider’s name] to make sure that the services and supports delivered meet my support needs; 5. treat you with courtesy and respect; 6. talk to [insert provider’s name] if I have any concerns about the services or supports being provided; 7. give [insert provider’s name] reasonable notice (outlined below) should I wish to cease this agreement; 8. comply with safe working practices; 9. not request support workers to provide services outside the agreement. |

**Ending this agreement:**

Should either party require this agreement to end, we agree to give [insert time period] notice.

If either [insert intermediary and/or service provider’s name] or [insert service recipient’s name] seriously breaches this agreement, then the requirement of notice may be waived.

**Agreement signatures:**

All parties agree to the terms and conditions of this agreement

|  |  |
| --- | --- |
| Name of service recipient: |  |
| Signature of service recipient : |  |
| Date: |  |

I confirm that I understand and agree to the term of this agreement,

OR

that this agreement has been explained to the person receiving the services and that they agree to this:

|  |  |
| --- | --- |
| Signature of nominee [if applicable]: |  |
| Date: |  |
| Name: |  |
| Signature on behalf of intermediary and/or service provider: |  |
| Date: |  |
| Name: |  |
| Position: |  |

***The service recipient and the intermediary and/or service provider should each keep a copy of the signed document.***

1. This is the person receiving the individual funding [↑](#footnote-ref-1)
2. Minimum review period is annually [↑](#footnote-ref-2)