Family & Child Service of Schenectady
An affiliate organization of LIVING RESOURCES

4 Key Questions to Ask Your Prospective Broker

Selecting a Broker to be part of your Circle of Support is an important decision. You can use these four questions to determine if the prospective Broker is a good fit. Use the notes section to jot down any other questions that you want to ask.

Question 1

How many years have you been in the field?

- A broker with field experience can coordinate services and understand regulations effectively.
- Self-Direction is the funder of last resort, so it is important your Broker know what resources are available and how to access them.

Question 2

What is the role of the Broker in the Self-Direction process?

- Supporting Person Centered Philosophy
- Facilitating team meetings
- Facilitating the process for the budget design
- Coordinating with the Circle of Support to put the budget into action
- Ability to cross train Circle of Support members – whether that be training for the individual or other Circle of Support Members

Question 3

What is your style of Communication?

- What type of supportive documentation do you want? (i.e., meeting minutes)
- How will the broker follow up with you?
- Does the Broker have one method of sharing information or are there multiple methods?
- Would you prefer paper-based or electronic?

Question 4

What is your Availability? What is your caseload size?

- Is this a full-time job or part time job for the Broker?
- Will the Broker be available during flexible hours (i.e., evening meetings)
- How many people does your Broker provide services for?