



Your personal budget

a user's guide

Your personal budget

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If you do not speak English and need help in understanding this document, please telephone the number below and state the name of your language. We will then put you through to an interpreter. Telephone **0113 222 4401**.

For general information about adult social care telephone Customer Services on **0113 222 4401**. Textphone: **0113 222 4410** or write to:

**Adult Social Care enquiries
Leeds City Council
Level 2
Merrion House
110 Merrion Centre
Merrion Way
Leeds LS2 8QB**

**It's now even
easier to find local
services and support!
Visit the Leeds Directory
(www.leedsdirectory.org) to search
on a wide range of services in your
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Ask your social worker to print out
the information for you, or ring the
Directory Helpline on
0113 391 8333 to get a
paper copy.**

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“Mum gets up to all sorts with her PAs – reading and looking through books, singing along to the old timers, even feeding the ducks and visiting the garden centre. This is the best thing I ever did for Mum. Go for it!”

Paul, who helps his mother, Olive, manage her personal budget (LS22)



Introduction

YOU are the best person to decide what's right for you. A personal budget gives you more choice and control over the kind of support you use – and how it's provided.

What is a personal budget?

A personal budget is money from the council for you to spend on the services and support you need to help you live more independently.

Personal budgets are more flexible than direct payments and can be used to buy support from both the council and other providers. Your money can be spent more creatively, mixing and matching services and tailoring your support to suit you.

Who can use a personal budget?

Anyone 18 or over, who is living in the community and is eligible for social care support. You can ask for an assessment to see if you are eligible.

Personal budgets are not currently available for people living in residential care.

How much money can I get?

The amount of your personal budget depends on your social care needs – which you will identify when you do your assessment (see page 7).

Helping you live independently in Leeds

Leeds Centre for Integrated Living can support you to live more independently. After you've had your self-directed assessment our Independent Living Guide can help you put together your support plan, access local services and more. Call us on 0113 214 3596.

Advisors at assist

assist stands for the Actively Seeking Independence Support Team. It is the free, independent, user-led support service for people using a personal budget or direct payments to employ a personal assistant in Leeds. It is free to access for any social care customer using a personal budget or direct payments. Your advisor can help you with:

- recruitment, interviews and how to supervise your PA(s)
- arranging reference and Criminal Record Bureau (CRB) checks
- support with disciplinary and grievance procedures
- arranging access to essential short courses such as moving and handling or child safeguarding, where applicable
- health and safety, forms and contracts etc
- managing your finances, including providing a payroll administration service, advice on becoming registered as an employer with HM Revenue & Customs (HMRC) and on setting up your own recording system.

Tel 0113 214 3599 • telephone 0113 214 3598 • Email assist@leeds.gov.uk



Leeds Centre for Integrated Living
Your gateway to independent living

“Before, my daughter Lauren had to choose from what services were out there, that’s all she could use. Now that she’s actually got the funding herself, I can help her organise her own care. We can choose what we want that care to be – whether it’s to use another person or service, an agency, a friend or family member, as long as everything is accounted for. It’s much better.”

Linda, (LS26)

Steps to getting a personal budget

It's a fairly straightforward process to get a personal budget, although there is some paperwork. Your care manager or social worker can help with this, and you can involve friends, family and carers at each and every stage, if you want to.

Please note that the diagram below gives a general idea of the process of getting a personal budget. It may vary depending on your personal circumstances.

START

Speak to your social worker or ring Adult Social Care Customer Services on 0113 222 4401



Step 1: Your assessment

The first step to getting a personal budget is self-directed assessment. It's called this because it's an assessment led by you, focusing on your day-to-day life and what kind of support you need.

You will be asked to fill in a questionnaire with help from your social worker – and your relatives, friends or carer if you wish, looking at things like:

- How safe and confident do you feel in your own home?
- Can you get out and about by yourself?
- Do you feel able to pursue your interests?
- How much help do you want to receive from family and friends?

Step 2: Finding out your indicative social care budget

Your social worker will then put all this information into the resource allocation system, a tool which calculates your indicative budget based on the needs you have identified during your assessment.

This amount is called 'indicative' because it's a good indication of what your personal budget will be, which you can use to start support planning. The final amount will only be agreed once your support plan has been approved – see below.

Step 3: Building your support plan

Once you know how much your personal budget is likely to be, it's time to put together your support plan with your social worker – again, with help from friends or relatives if you wish. This is your plan for how you want to use your personal budget.

It should include what you want to change in your life, and what you need to do to make these changes. It will say what you plan to do to meet your social care needs in the way you want.

It's OK to include things in your plan that don't cost money and other things that you are planning to pay for yourself, as well as the things you will pay for with your personal budget. You will also need to say how you will manage any risks.

Your personal budget

As you put your support plan together, think about things like:

- How do you want to live your life? What do you want to do now, and what do you see yourself doing in the future?
- Who will help you, and when?
- How will you manage any risks?
- How do you want to receive and manage your social care money (see page 12 for all the different options).

If you want to receive your personal budget as a direct payment you will need to open up a new bank account which is just for your personal budget.



Your circle of support

This means the group of people who know you well. It could include family members, friends, people you know from work or who live near you. It could include an advocate, or paid staff who support you.

"I have a young family and really enjoy spending time with them. In the past it's been difficult. My personal budget has made it easier for me and my son to do things together which we couldn't do before. The personal budget has improved the quality of life for all my family."

Stephen (BD11)

Step 4: Getting your plan agreed

The council will need to agree your plan once it's finished. This is because social care funding comes from taxpayers' money, and councils have a duty to make sure the money is used responsibly and well.

While you are putting your plan together, your social worker will be able to advise you on anything that might not work well, or not be the best use of your budget.

Normally, as long as you spend your budget on support that matches the eligible social care needs you identified during your assessment, and it is within your indicative budget, your plan should be agreed.

If your plan is agreed, you will then find out the final amount of your personal budget, and you can then start using it to buy services and support.

In the event that your plan is not agreed, your social worker will work with you to make any changes that are needed, before sending for approval again.

Step 5: Start using your personal budget!

Now that your plan has been agreed, it's time to start using your budget.

Depending on what you've agreed in your support plan, you could use it for a range of things – employing a personal assistant to help you day-to-day, or using the extra flexibility to pursue your interests.

Remember that buying services and support from private providers is no different to buying anything else on the high street: some sellers will be more reliable than others.

There are some things you can do to make sure you get value for money and avoid putting yourself at risk by buying poor-quality products or services.

See Leeds City Council's *Guide to Buying Services and Support* for some simple advice to help you find reliable local services, stay safe and make the most of your personal budget. Your social worker will be able to get you a copy, or download it free from:

www.leeds.gov.uk/personal_budgets

Carers and personal budgets

If you care for someone, you may find that a personal budget can help the person you care for live more independently – which will, in turn, help you.

Can carers themselves get a personal budget?

No, at present in Leeds carers' assessments will take place as they do now. But you may find that when the person you care for uses a personal budget there are benefits for you too.

What do personal budgets mean for carers?

A personal budget does not mean more work for carers, unless you want to take on more responsibility for helping the person you care for manage their social care budget.

There may be some extra paperwork to do if the person you care for decides to receive their personal budget as a direct payment, and you agree to help them manage this.

However, there is a lot of other support available to help people do this, such as ASIST, the Leeds personal budget and direct payments support service (see page 5).

If the person you care for is interested in directing their own support, talk to them about what this might mean for both of you.

"Having a personal budget will be about allowing me to do things that I want to do rather than the things that I've got to do. My husband, David, will be able to enjoy time by himself and when we're together we can enjoy being together – rather than growing increasingly frustrated. I think it will give him, as well as me, back our lives.

It's a novel experience for me, to be able to expect the service to fit my needs rather than me having to fit in with what the service can offer."

Tizzy (LS16)

"More independence for Tizzy means more independence for me. It will leave me a lot freer to go off and do things by myself for longer.

We won't be caught up with one another all the time. It will help us develop in different ways rather than narrowing our lives down to things we have to do together and not much else."

David, Tizzy's husband

Ways you can receive the money

You can choose how you want to receive and manage your budget. The different ways you can do this are described below. Your social worker will discuss these options with you as part of your support plan, so you can decide which one would work best.

- **Direct payment** – payments are made directly to you so you can buy services and manage your budget.
- **Direct payments to a suitable person** – direct payments can be made to a suitable person (such as a family member) in cases where you cannot, or do not want to manage your own direct payments.
- **Trusts** – direct payments can be made to a group of people who manage them on your behalf. The Trust is usually a small group of people, and can include anyone you agree to, such as members of your family.
- **Individual Service Funds** – this is where you ask a provider to hold your budget and organise and manage your support. Speak to your social worker about how this arrangement could work for you.
- **Local authority-managed** – this is where you ask Leeds City Council to hold your budget and manage your support. If you choose this option, you can only buy support from the council's own services, or from providers they already work with.
- **Mixed budget** – a combination of the above. For example, you could receive part of your budget as a direct payment, but ask the council to manage another part.

What if your needs change?

If you think that your needs have changed from those identified during your assessment, then you should speak to your social worker as you may need another assessment.

Questions and answers about personal budgets

Here are some questions people often ask about personal budgets.

A full list of frequently asked questions is available at:

www.leeds.gov.uk/personal_budgets. If you don't have access to the internet ask your social worker to print you off a copy.

1. Who can get a personal budget?

Personal budgets are available for anyone with eligible, community-based social care needs. Legally, you can't use a personal budget to pay for residential placements (apart from short-term respite) or for health needs, so if you need those services, they will be provided in the same way as now.

2. If I use social care, do I have to have a personal budget?

If you are an existing customer, your social worker will offer you the option of having a personal budget as part of your annual review. You can decide together whether you want a personal budget straight away or not.

If you are a new customer (from July 2010) you will have a personal budget. This will mean different things to different people - it's up to you how much control you have.

So, if you want to have a direct payment and organise your support yourself, you can. If you'd prefer to have services provided and your budget managed by the council, that's fine too. There are lots of different ways we can organise things to meet your needs - and all of them are considered 'personal budgets' because they allow you to choose and control your support.

3. What if I'm happy with my current care package and don't want to change?

A personal budget does not mean you have to change the care you receive. If you are happy with some - or all - of your current support, that's great. You can use your budget to buy the same services you use now. You can also ask the council to manage your budget for you if that's what you want. But if there are some things you would like to change, you can do that too.

4. What if I'm not sure a personal budget is suitable for me?

A personal budget lets you tailor your support to your preferred lifestyle. It does not mean you have to make big changes – and you don't have to manage the money if you don't want to. It is therefore suitable for almost everyone. If you have any questions, please ask your social worker. Or you can speak to people in Leeds who direct their own support already – contact the Personal Budgets Peer Support Group on **0113 214 3594** or visit www.personalbudgetsleeds.org.

5. What is the difference between a personal budget and a direct payment?

Personal budgets and direct payments are not the same thing.

A personal budget means you will:

- know how much money is available to you to meet your social care needs
- have a support plan which says what outcomes you want to achieve with that funding
- be able to choose and control how and when your budget is spent.

Some people will choose to manage their personal budget as a direct payment. But you can have a personal budget even if you don't want to manage a direct payment. The budget can be managed by a third party, a Trust, a provider or the council.

6. What if I don't want to – or can't – manage my personal budget myself?

You don't have to! You can choose how you want to receive and manage your budget – there are various different ways. Your social worker will discuss these options with you as part of your support plan, so you can decide which one would work best for you.

See page 12 for more information about the different ways you can receive and manage your personal budget .

7. What type of things can I buy, and what can't I buy?

You can suggest any service or item as part of your support plan – as long as it meets the needs identified in your assessment, and will help you to achieve the outcomes you want. You should make sure that what you are suggesting will work well and is cost-effective. If you are unsure or have any questions, please talk to your social worker, who will discuss your plan with you.

Further information and support

...about personal budgets

- Speak to your social worker, if you have one. If they can't answer your question they will know who can!
- Visit www.leeds.gov.uk/personal_budgets for downloadable factsheets, answers to frequently asked questions, films starring local people talking about using personal budgets and more. No web access? No problem! Ask your social worker to print them for you, or call Customer Services on **0113 222 4401**.
- Speak to people who already use a personal budget or direct payments. Contact Free to Live, the Personal Budgets Peer Support Network, on **0113 214 3594** or visit their website at www.personalbudgetsleeds.org.

...about employing personal assistants

- Grab a copy of Leeds City Council's *Guide to Becoming an Employer* if you would like to employ a personal assistant privately.
- If you are using an agency, look for the council's *Guide to Buying Services and Support*.
- Speak to ASIST, the Leeds personal budget and direct payments support service (see page 5).

...about finding services and support

- Use the new *Leeds Directory* (www.leedsdirectory.org) to find local services online. Search by service, postcode or area of Leeds.
- Pick up a copy of the *Guide to Buying Services and Support* for tips on dealing with private and independent suppliers.

You can get copies of all booklets and other information from your social worker, or Social Care Reception on **0113 247 8630**. You can also download them online from www.leeds.gov.uk/personal_budgets or order them by email from selfdirectedsupport@leeds.gov.uk.

