

Once a budget has been identified you can start to make a **support plan** saying how you want to spend this money. You do not have to do this by yourself. Your social worker should also work with you to put together the support plan. The principles of SDS emphasise that support planning should be **collaborative**, provide you with **informed choices** and **involve** you in decision making. You may need help from someone else with planning and thinking about how you can achieve this. This could be a support worker from an organisation that offers help to people with social care needs or it could be a friend or relative who knows you well.

This plan isn't just about getting hours of support from staff, but using your budget in ways which help you achieve the life you want. You can be creative with how you use the money so it can go further than using traditional services and solutions.

Once you have decided how you want to use the money and have come up with a support plan that meets your outcomes, this must be agreed by your social worker/care manager. They need to check that your plan meets your needs and is also legal and safe. If they agree this then you can start to organise how you turn your plan into a reality. Once it has been agreed, the sum of money available to you will be called your **individual budget**.

Having an individual budget means being in control of decisions about the support you get and how it is organised. This includes who provides the support, and when and how you get that support. This also means deciding how to manage the money.

There are different ways you can organise and manage the individual budget. You will want to think about this while you are doing the planning. There are four main options as set out in the Act.

Option One

The money can be paid directly to you; this is called a **direct payment**. This is the only way in which you can directly employ a **personal assistant** (PA) to help you achieve the outcomes identified in your support plan. A personal assistant is not a member of a provider organisation, but is someone you choose to employ to provide the support you need in a flexible manner. You can also use option one to purchase services from a registered care provider or a product to meet your needs.

A separate bank account will have to be opened for the payment of the wages of the personal assistant. The money can be paid to a close family member² who will manage this on your behalf; this is called an **indirect payment** or a **third party direct payment**. There are also organisations that can handle the financial responsibilities, (issuing timesheets and calculating tax and holiday pay), of being an employer for you. You can find out more about organisations who can help you manage a direct payment, including employing a PA, here: www.sdsscotland.org.uk. Also the Scottish Government has produced a guide to employing personal assistants: www.gov.scot/Publications/2014/04/4710 this handbook will give you the information you need to help you decide whether this is the right option for you.

In certain, appropriate circumstances the supported person can employ a **family member** as a personal assistant. MECOPP has produced a separate FACTSHEET on employing a family member as a PA.

² If someone has a Continuing Power of Attorney over your financial matters they cannot be responsible for handling the direct payment at the same time as being your personal assistant

Option Two

The money can also be managed on your behalf by a care provider, support organisation or local authority. This is called an **individual service fund**. The supported person selects the support that they wish and the budget holder makes the administrative decisions. This option gives further choice and control to the supported person to choose the support that they want without becoming an employer.

Option Three

The supported person 'steps back' and chooses to leave the detailed decision making to the local authority who can buy services for them. The principles of choice, control and involvement should continue. This may be described as '**arranged service provision**' or '**direct services**'.

Option Four

You can also use a mixture of the different options to manage different aspects of the support plan.

Once the money is organised you are ready to follow the plan and use the individual budget to get the services you need to achieve your identified outcomes.

Reviews

It is important to make sure that your support plan is going well; there will be time to consider with others including the social worker if things have gone to plan or if your needs have changed.

You will also be required to show how the individual budget has been spent and keep **reasonable financial records** if you choose option 1. Your review will help to determine if your personal outcomes have been achieved and that your needs are being met, and that you are safe and well. This would be the time to make any changes you need to make.

If you feel that your support has not been going well, for example, you have concerns over the quality of care and support provided or the budget allocated to you is insufficient to meet your assessed needs, you could keep a written journal of events to use as evidence for a challenge. You could also keep a spoken record in your mobile phone or create a short film that details any problems.

If you would like further clarification on any of the information contained in this FACTSHEET, please contact the 3 R's Project on 0131 467 2994 or email them at:

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Here is a systems map that incorporates the various components of decision making and charging in an SDS context

COSLA National Strategy and Guidance: Charges Applying to Non-residential Social Care Services 2019/20

