



Individual Budgets



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Background



- Part of the Government's personalisation agenda
- Manchester selected as one of 13 Pilot sites across the country
- Pilot ran from December 2005 to December 2007
- Developed one self-assessment questionnaire (SAQ) to allocate funding via a Resource Allocation System
- Manchester decided in the early stages of the Pilot to mainstream IB's to all customers



Mainstreaming Individual Budgets



- Since June 2008, Manchester ASC have offered all customers who fit the eligibility criteria for services (FACS), an individual budget to meeting their assessed needs



- This is in line with improving services to Manchester's customers and giving them more choice and control
- Introduction of new IT system to support this



- Integration of old assessment tool and new resource allocation system into one core assessment

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What is an Individual Budget and how does it work?



- it is an amount of money that is allocated to each customer (meeting the FACS criteria) to meet their needs
- this amount is calculated by a number of questions in the ASC core assessment which is completed by a social worker/care manager with the customer
- when the amount of money has been agreed, a support plan needs to be drawn up showing how it will be spent **to meet the customer's assessed needs**
- customers are encouraged to be involved in the support planning process – with assistance from friends, family, social worker, care manager, broker etc
- support plan is signed off by ASC representative

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Individual Budget Options



The different ways customers can take their Individual Budget are:

Cash



- this option is generally chosen when the customer wishes to employ their own staff (Personal Assistants) and involves :

- the money being paid into a dedicated bank account every four weeks by the City Council



- all employees have to be registered with the Inland Revenue (cannot be paid “cash in hand”) and have a CRB check

- audited by City Council

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Individual Budget options



Virtual



- this option is for customers who do not want to manage their own budget and are happy for their Social Worker/Care Manager to commission services (eg home care, day care) from a provider who ASC has a contract with, on their behalf



- the customer will know how much their allocated budget is, and the cost of their services
- the Provider has a copy of the customer's support plan to work to

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Individual Budget options

Individual Service Fund (ISF)



- this option gives the customer (or their representative) flexibility of direct discussions/negotiations with a service provider of their choice
- the chosen ISF Provider must arrange all services/support the customer requires (even if they do not provide that service)
- the City Council pay the ISF provider direct
- the contract is between the customer and the ISF provider

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IB Rules



- Support plan should reflect the identified assessed needs and demonstrate how they will be met, to include both natural support (free support provided by friends/family/neighbours), paid support and the use of technology
- Support plan must remain within the agreed indicative budget
- The content of the support plan must show that needs will be met in a lawful manner
- IB funding cannot be used to purchase health related treatments
- Must ensure the spending does not bring the council into disrepute
- The IB can pay for delivery and preparation of food but not for the food itself
- IB funding cannot be used for travel/transport costs unless not in receipt of mobility allowances or to top up this allowance (e.g. if the customer's DLA (Mobility) is not sufficient to cover all their community involvement travel costs and they may ask to 'top up' from their individual budget. In such instances the customer's support plan needs to include the DLA (Mobility) in the costings and clearly demonstrate these funds are being used first).

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Number of IB's in place at 30th November 2009



| SERVICE AREA | TOTAL IB's |
|------------------------------|------------|
| HIV | 12 |
| Learning Disability | 277 |
| Mental Health | 133 |
| Older People | 2620 |
| Older People (Mental Health) | 58 |
| Physical Disability | 669 |
| Substance Misuse | 2 |
| Carers | 1629 |
| Totals | 5400 |

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| SERVICE AREA ¹⁴ | CASH | ISF | MIXED | VIRTUAL | TOTALS |
|----------------------------|------|-----|-------|---------|--------|
| HIV | 5 | | 1 | 6 | 12 |
| Learning Disabilities | 101 | 3 | 7 | 166 | 277 |
| Mental Health | 24 | | | 109 | 133 |
| Older People | 198 | 45 | 79 | 2298 | 2620 |
| Older People (MH) | 2 | | 1 | 55 | 58 |
| Physical Disability | 259 | 12 | 26 | 372 | 669 |
| Substance Misuse | | | | 2 | 2 |
| Carers | 1629 | | | | 1629 |
| Totals | 2218 | 60 | 114 | 3008 | 5400 |

Peter's story



“My Individual Budget is fantastic”

- Employs three Personal Assistants via a Cash IB

- Has more independence and choice – able to spend money differently/creatively



- Hobbies are photography and painting

- Now able to enjoy visiting museums, art galleries, parks, Gorton Visual Arts Group etc., with his PA's as well as with family members



- Has grown in confidence and developed new skills
- Holidays allow break for informal carers

William's Individual Budget



- Creatively meeting his needs with a mixed IB
- Excellent value for money
- More independence and choice
- One happy customer!

