

Factsheet 9: Managing your personal budget

Managing your Personal Budget and organising your support

Whether you are an individual with care and support needs, or a carer with support needs of your own, if your assessment (Factsheet 6: Care Act Assessment) shows that you are eligible for support from Shropshire Council, you may be offered a Personal Budget to meet some or all of those needs.

Some assessed eligible needs can be met in different ways, not always through services that require funding. You may have thought of some solutions on your own, but we can also work with and support you to think about these things.

If you have an assessed eligible need you will be invited to create a support plan. Your support plan will design and detail how your needs are going to be met, and if there is any cost, record what these will be.

The collective costs identified during the support planning process (Factsheet 8: Planning Your Support) make up your indicative Personal Budget. Once your support plan and indicative budget have been reviewed and agreed, you will be informed of your allocated Personal Budget amount.

The different ways of managing your budget

Your Personal Budget is intended to enable you to have as much choice, control and involvement in your own care and support as you would choose and are comfortable with. When it comes to managing your Personal Budget, you can choose to have a friend, relative or someone else to help you to do this, or choose to nominate someone else to do this on your behalf where they have the legal right to do so.

How much support you need or choose and the way you decide to manage your Personal Budget will be different for everyone and may also change over time. You may not want much control at first, because you just want the care and support you need to be arranged and organised for you. When routines are in place and things settle, you may feel you have more time and energy to explore the different options or because you feel you would like more flexibility and control.

In Shropshire there are three ways you can choose to manage your personal budget:

- Direct Payment (DP).
- Individual Service Fund (ISF).
- Council-managed fund.

You also have the option to choose more than one method, and use a mix, as long as the total amount falls within your allocated Personal Budget and detailed on your support plan.

Method 1 - Direct Payment (DP)

(You can find out more in Factsheet 10: Having a Direct Payment)

You can choose to receive some or all of your Personal Budget personally through the use of a direct payment. Another option is to nominate someone else to receive and manage a direct payment on your behalf, this is sometimes called an 'Indirect Payment'.

When you choose to take a direct payment you, or the nominated person, will receive the correct sum of money from the council. The payment you receive will allow you to directly purchase the care and support that has been agreed in your support plan.

If you choose to have a Direct Payment you will get help to do this. You can get initial and ongoing information and advice from your Social Work Practitioner.

Some people choose to use their direct payment to employ a Person Assistant (PA). Your Social Work Practitioner is able to provide advice and information on the benefits and potential challenges of employing your own PA, and about your responsibilities as an employer. If you decide you don't want to employ someone directly, you may instead use your payment to purchase support from an established care provider and you can have help to do this too.

Shropshire Council First Point of Contact.

Tel: 03456789044

Method 2 - Individual Service Fund (ISF)

(You can find out more in Factsheet 11: Having an Individual Service Fund (ISF))

You can choose for some or all of your Personal Budget to be paid directly from the council to your chosen service provider. You will stay in control and will agree with that organisation how they will use it in line with your agreed support plan and identified outcomes.

You will have flexibility in how to use the money to meet your assessed needs and agreed outcomes that have been detailed in your support plan. An ISF gives you the flexibility to manage your care and support in a way that suits your particular needs and circumstances, such as giving the option to 'bank' support hours that are not required on any particular day. This means that if you have friends or family visiting, or any other change where you don't require support in the 'usual routine', you can cancel support for that day and use it some other time when you do need it.

Method 3 – Council-managed fund

You can ask the council to manage your Personal Budget on your behalf and still have some control over how the budget is spent by having an active role in creating your support plan.

Once your support plan has been agreed, the council will manage your budget in accordance with your support plan to ensure that you receive the support that you require, that it is provided by your chosen provider and that you receive it as and when it was agreed.

This option gives you the least control and choice about buying your support. It may be your preferred option in the short term or in an urgent situation, but in the longer term we would encourage you to consider taking a Direct Payment or Individual Service Fund (ISF).

Organising your support

Your Personal Budget is designed to help you purchase and manage the support you need in a way that meets your assessed needs and agreed outcome contained in your support plan.

The purpose of your Personal Budget is to help you to:

- Regain or develop skills to be able to live with more independence.
- Build your confidence.
- Connect with your community.
- Continue to manage and balance your caring responsibilities.
- and ensure that, wherever possible; you are able to work towards a future with an improved quality of life where you will not have to rely on Shropshire Council for support.

We know that a lot of people receive the majority of their support from family, friends, neighbours, community groups and other organisations, and that this is an important part of living an independently in your own home.

Wherever possible, Shropshire Council wants to ensure that access to these natural forms of support are available, and this will be a key part of organising the support that you require through the process of creating a support plan.

(You can find out more about support planning in Factsheet 8: Planning Your Support. Your social care practitioner can provide you with more details if required.)