

What are Personal Budgets?

Personal Budgets are sums of money agreed by the Local Authority to cover your eligible social care needs. You will have a support plan, agreed with the Local Authority, which sets out how you want to live your life and the support you need to achieve your goals.

Am I eligible?

To receive a Personal Budget, the Local Authority will need to assess whether you are entitled to public funded care and support. They assess against a national minimum eligibility threshold. This is a list of needs that a person might have, and means that all Local Authorities across the country must provide social care support to anyone with at least these needs.

Can I have help with my Personal Budget?

You may want some help with your Personal Budget. This may be through friends, family or professionals already known to you, or you may pay a person to assist you with planning and administering your plan (a support broker or an independent advocate). Once the plan is approved you can use a specialist support provider to take care of finding and managing support. Remember that you are in charge of your own plan and you should decide what it is used for without being heavily influenced by any helpers.

What is the process?

1. Assessment

All people whose needs should be met by the Local Authority are entitled to a Personal Budget. Most authorities will ask you to fill out a self-assessment form about the support you need and, based on your answers, tell you a rough figure (called an indicative amount) of the money you are entitled to for support. If you disagree with this amount you can speak with the Local Authority to put forward your case. If you are not able to agree then you can make a formal complaint to the Local Authority but this does not guarantee any change; complaints will only be accepted if a mistake has been made or if the Local Authority has not fulfilled its legal duties. Once a Personal Budget is agreed then you, the Local Authority and any other parties involved decide whether you will manage this budget yourself.

2. Making the plan

The plan should establish your needs as well as your goals and how you intend to achieve them. It will outline your ideas about what to spend your budget on and how it will help you achieve your goals. It will explain how you will arrange and manage the support and will make clear whether you will be getting any help in any areas of the plan. There is a lot of flexibility on how a plan is set out; it does not need to use words, it can include pictures or can even be a video.

3. Agreeing a plan

If the Local Authority does not feel the plan meets your needs or goals then they can reject it. You and the Local Authority must then discuss the issues and try to come to an agreement. After this point, if you are still unhappy you can make a formal complaint to the Local Authority but this does not guarantee a decision in your favour.

Your budget should be:

- **Transparent:** You know exactly how much money you have to spend
- **Controllable:** You are able to control how your money is spent
- **Flexible:** You can spend the money on the widest range of options possible
- **Monitored:** You and those assisting you are using the money appropriately and efficiently
- **Outcome focused:** What you achieve with the money is more important than what you spend it on

4. Organising the money

The Local Authority can either hold the money for you or make Direct Payments to a bank account. The money must be paid into a bank account that is made just for this money, so the money can be tracked, but you can choose whether to organise this yourself or to ask a trusted person or group of people (such as a legal trust or brokerage agency) to manage your money. Whoever organises the money should make a spending plan based on your support plan, and keep track of spending, as the Local Authority will continually check the money is being spent responsibly and appropriately.

Organising the support

You then have to arrange and manage the support that was decided in your plan. Many people will get specialists to provide a range of services or ask the council to provide those for them. Others, however, will arrange the support themselves. You have the freedom to search out the best deals available on the different supports you need and can be creative in getting the support you need to get the most out of your budget. You can also pool your budget with others to create a larger pot of money, enabling you to collectively buy services tailored to you.

5. Review

At least once a year the Local Authority will want to review how the budget is working. The aim is to make sure that the support provided is helping to keep you safe and healthy, as well as meeting any goals that were set in the plan. As you can adjust your plan as you go along, the Local Authority will also check any changes made to the plan and think about any future improvements that can be made to it.

Where can I find out more?

Disability Rights UK have written a number of detailed Factsheets on Personal Budgets which you can find at www.disabilityrightsuk.org/personal-budgetsthe-right-social-care-support