

# INDIVIDUAL BUDGETS

...giving you choice and control



**BARNSLEY**  
Metropolitan Borough Council

## WHAT IS AN INDIVIDUAL BUDGET?

Individual Budgets are designed to help people to take control of their own social care budgets, manage their support and choose the services that suit them best. The person is at the centre of the planning process as they are best placed to understand their own needs.

You will be told exactly how much money you have to spend on your eligible care and support needs.

This amount of money is known as your 'individual budget'.

## WHO CAN HAVE AN INDIVIDUAL BUDGET?

You are eligible for an individual budget if:-

- You are an adult (age 18 and above) with a physical disability.
- You are an adult (age 18 and above) with a learning disability.
- You are an older person (over 65).
- A Person with mental health support needs.
- You are a young person with a disability who are in transition.

## STEPS TO GETTING AN INDIVIDUAL BUDGET?

### First step

You will need to be eligible to receive support from Social Services – a social worker or care manager can help with this.

### Next step

You will need to complete an Individual Budget Assessment form. This will help to identify your needs. Once this is completed you will be told how much money you can have to meet your needs.

The assessment looks at areas of your life like:

- Your personal care needs.
- Social inclusion.
- Keeping safe.
- Aspects of daily living.

### Finally

You will be asked to write a 'support plan'. You can do this on your own or can get help to do this. This plan will say how you intend to use the money. The plan will need to be agreed with your social worker / care manager.

## HOW WILL THIS HELP YOU?

You can think about what you want to achieve and how you want to organise your support. There are some support planners who could help you with this.

### Help with your support plan

You might want to write your support plan yourself – we have some support planning guides that can help you to think about what needs to be in your plan.

You might want some help to write the plan. Help could be provided by family, friends or some other people that you think may be good support for you.

There are some support planners who could help you with this.

## WHAT NEEDS TO BE IN MY SUPPORT PLAN?

When you write your support plan - think about the needs you identified within your Individual Budget Assessment and the outcomes you want to achieve.

(An outcome is something that you want to change relating to your needs to make your life better).

Most of the outcomes someone wants to achieve will only be viable with additional support and commitment from:

- The person themselves.
- Their family, friends and social network.
- Other organisations.

However, the 'Support Plan' will help everyone work out who needs to do what in order to achieve each outcome.

Your plan should identify how you are going to meet these needs and what support you need to help you.

It does not need to look a certain way or have big words in it – it needs to make sense to you.

## **ARE THERE RESTRICTIONS ON WHAT I SPEND MY INDIVIDUAL BUDGET ON?**

Your Individual Budget needs to be spent on meeting the eligible needs you identified in your assessment. You can be

flexible and creative about how you meet your needs.

Your social worker or care manager will have a checklist for support plans, this checklist will ask things like:

- Does the plan talk about needs and how these needs are going to be met?
- Does the plan identify how you are going to keep healthy, safe and well?
- Does the plan say how you are going to organise your support?

The Guide on Support Planning helps you to make sure you have thought things through.

## WHAT CAN MY INDIVIDUAL BUDGET PAY FOR?

You could spend your budget on many different things, for example:

- You might want to employ a personal assistant. These can be friends or members of your family but not immediate family members (spouse, father, brother etc) if they live with you.

- What about a piece of equipment? There are lots of new things that can help you keep your independence.
- You can buy support from an agency if you want.

Sometimes, talking about this with someone else can help you to think about different ways that make sense to you.

## STEPS TO GETTING AN INDIVIDUAL BUDGET?

You can organise your support in different ways:

### **A Direct Payment to you**

You can receive your money as a Direct Payment if you want to manage your support yourself. This will mean that you will be responsible for paying and organising this support.

You won't be on your own though - you can get help with recruitment and payroll from an independent support agency

### **An Agent - An Indirect Payment**

This is when someone else manages the money for you. This can be a family member or friend.

An organisation can also manage the money for you if you think that you will find this difficult – they call this ‘managed accounts’.

### **User Controlled Trusts**

This is when your money is paid to a group (this might be a group of friends or family members) who form a trust and manage the money for you.

The council and the trust will set up a contract between them, and arrange to pay the money to the trust.

### **An Individualised Service Fund**

The council pays your money to a service provider who you have chosen to give you your support and look after your money.

The service provider has to keep this money separate from all its other money and use it only to pay for the support that you need that you have written in your support plan.

### **A care manager**

The care manager acts on your behalf. He/she plans, arranges and organises the support for you, and makes sure that it is paid for. If you decide that a care manager is the best person

to help you, then the council will keep this money and use it to pay for your services.

### **An independent broker**

You pay an independent broker to look after the money for you.

## **WHAT CHECKS WILL THERE BE ON WHAT I HAVE SPENT?**

If you receive a Direct or Indirect payment you will need to complete a financial return to show the local authority what you have spent.

In addition a social worker or care manager will visit you periodically to review your need. This will be focussed upon:

- What's working well
- Things that might need to change

## **WHAT IF MY NEEDS CHANGE?**

You may want to change your support plan because you think that there might be a better way of meeting your needs. You can do this without talking to the council, so long as it is within

your individual budget figure. If you are unsure you can ask for advice.

### **However**

If your needs increase, then you need to revisit your Individual Budget Assessment – talk to your care manager about this.

If your needs decrease you need to tell your social worker or care manager.

## **WILL THIS AFFECT MY PERSONAL INCOME?**

Your Individual Budget is not personal income – it's paid to you to meet your needs. You do not need to declare it for tax or benefit purposes.

## **WHAT IF I DON'T SPEND ALL OF MY BUDGET?**

You may find that you have money left over. You can keep 5% of your total Individual budget to enable you to make further changes to your plan.

If you are spending significantly less then you need to tell the

local authority so that a new Individual Budget Assessment can be completed.

## HOW CAN I GET MORE INFORMATION?

You can find out more about Individual Budgets by contacting:

The Self Directed Support Team  
Wellington House  
36 Wellington Street  
Barnsley  
S70 1WA

Tel: (01226) 772425

or visit our website at [www.barnsley.gov.uk](http://www.barnsley.gov.uk)

**Further copies of this leaflet are available from:**

**The Communications Officer  
Wellington House, 36 Wellington Street,  
Barnsley, S70 1WA.**

**Telephone: 01226 775649**

Nëse j'u nevojitet ndihmë për të kuptuar këtë dokument, j'u lutemi n'a kontaktoni.

若您需要幫助來理解本檔，請與我們聯繫。

यदि आप को इस दस्तावेज़ को समझने के लिए सहायता की आवश्यकता है तो कृपया हम से संपर्क करें

Jeżeli potrzebujesz pomocy w zrozumieniu tego dokumentu skontaktuj się z nami

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Обратитесь к нам, если для того, чтобы понять этот документ, вам нужна помощь

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If you need help  
understanding this  
document please contact  
us on:

**01226 772370**

**Barnsley**   
Primary Care Trust



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