

Care and support plans and personal budgets

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Information sheet B1

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This information sheet explains your care and support plan and your personal budget and how they work.

If you meet national eligibility criteria for care (please see our information sheet **C5: Help with paying for care and support**) and have less than £23,250 in capital and savings, there are options for you to consider about how we can support you.

If you have more than £23,250 in capital and savings, you will probably need to pay for your care and support and make your own arrangements if you can, but we can provide information and help for you to do this if you would like us to. There may be an administration charge for the time it takes us to make the arrangements for you.

What is my care and support plan?

We will talk with you about the things you would like to achieve (often called outcomes) to help you to be as independent as possible. These are written into your **care and support plan**. You may prefer to write this yourself, or with the help of someone else, but we will have to make sure that the plan will safely achieve the things we agreed.

Most people will be able to meet some of the outcomes that are important to them by doing things differently or by getting help from family or friends or using services that are available in their local community. The plan will list these. If there are still eligible outcomes that you cannot meet in any of these ways then the plan will also list any money, services or equipment we agree to provide for you.

To make sure everyone knows what you want to achieve, we recommend anyone who is helping you should have a copy of your care and support plan. We will only share it with your permission.

What is my personal budget?

When we complete your care and support plan, the things we agree to help you with are worked out as a weekly amount of money. This is

called your personal budget. There are several ways you can choose to manage your personal budget:

- You can receive it as a payment into a bank account (set up especially for the purpose) so you can arrange and pay for your own care and support. This is called a Direct Payment, (To find out more please read our information sheets **C2: Direct Payments: An introduction and C3: Direct Payments guidance**), or
- You can have a Direct Payment and ask someone you trust to manage it for you (they must be willing to do this), or
- You can ask our independent advisory service to manage your direct payment for you, or
- You can ask us to manage it for you (this is called a Local Authority Managed budget), or
- You can choose a mixture of any of these.

How is my personal budget calculated?

When we talk with you about what you want to achieve and how you plan to achieve them we will first look at your immediate network, for example, family and friends, then at what community resources could help you, for example voluntary groups. After that, if there are still eligible outcomes that cannot be achieved in any other way we may agree to help you pay for them. We initially set a budget that is based on our experience of how much it has cost people with similar needs. This helps us to work with you on your individual care and support plan.

Using this figure, together we will write your detailed care and support plan, which will determine more accurately the costs based on your individual circumstances. This may be more or less than the initial amount.

We will also talk with you about your finances to work out what you should contribute towards your budget. The final combined figure is your personal budget.

We do not have a rigid policy as to what the maximum level of funding will be, but we operate a decision making process that considers all requests for a personal budget. This checks that all possible options have been explored to meet a person's eligible needs based on their

own facts and that the Council is obtaining best value. It uses the following guidance from the Care Act 2014:

'In determining how to meet needs, the local authority may also take into reasonable consideration its own finances and budgetary position, and must comply with its related public duties. This includes the importance of ensuring that the funding available to the local authority is sufficient to meet the needs of the entire local population.'

'However, the local authority should not set arbitrary upper limits on cost it is willing to pay to meet needs through certain routes.

'The authority may take decisions on a case-by-case basis which weigh up the total costs of different potential options for meeting needs, and include the cost as a relevant factor in deciding between alternative options for meeting needs. This does not mean choosing the cheapest option; but the one which delivers the outcomes desired for the best value'.

If you have been assessed to have short breaks, the costs of these are different to your normal weekly cost and these will be worked out and shown separately.

We will send you your personal budget statement which will show:

- Your personal budget
- Your contribution towards your personal budget and how we worked this out
- Our contribution and how we worked this out

Promoting your quality of life

We want to provide support and/or equipment that will help you live your life as independently as possible. This may mean that, with your permission, we talk to other organisations that can help you achieve the things we agreed in your care and support plan.

Your care and support plan will be regularly **reviewed**. As you achieve things, we will agree a new care and support plan with you.

What is a review?

Someone will contact you to arrange a convenient date to talk with you, and anyone who helps you, to check that what we agreed in your care and support plan is working. This is called a review.

We will talk to you about things that are working well for you and things that could be changed to improve your independence. The review must include your views and may also include the views of your family/carers. The people providing your care and support will also be included.

At the review any changes to the amount of money, support or equipment you need will be agreed. We expect this to reduce as you regain your independence and have support from family and friends, but this may not be possible for everyone.

Where can I find out more?

Please look at our website (where you can also find all of our publications). www.somerset.gov.uk/adultsocialcare or phone Somerset Direct on 0300 123 2224

Your opportunity to feedback

We welcome your comments about the services you receive. If you would like to tell us what you think, please either:

- Contact us, by going to our website, www.somerset.gov.uk, or
- Speak to your social care worker.
- Phone Somerset Direct on 0300 123 2224, or
- Contact the Adults and Health Customer Experience Officer
Floor B2 East
County Hall
Taunton
TA1 4DY
Email: customerexperience@somerset.gov.uk

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