

From a Support Plan to an Individual Service Fund

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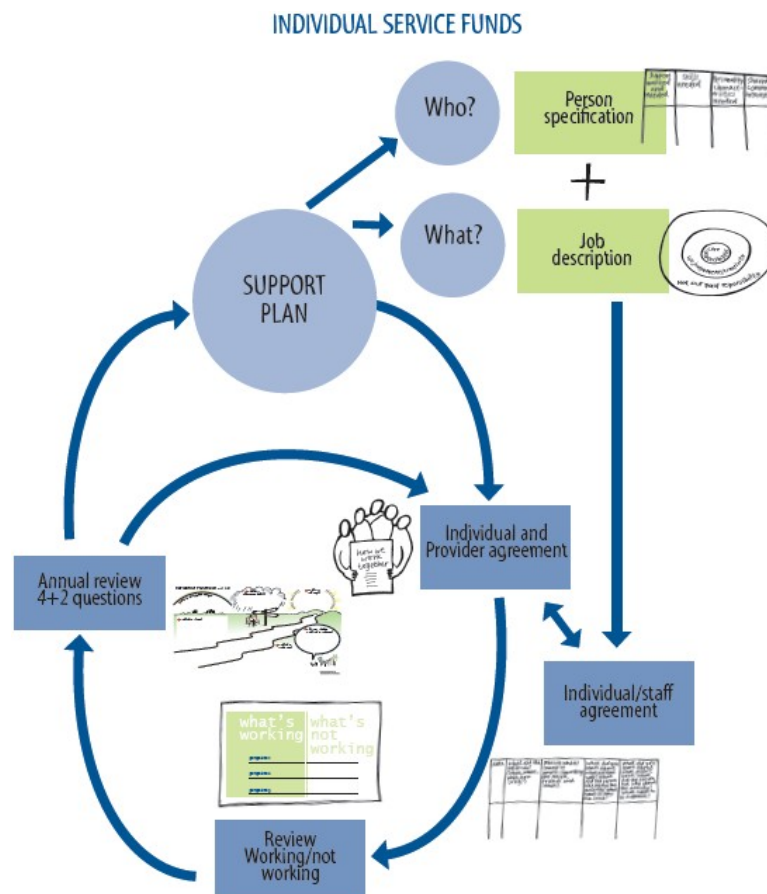
Introduction

When someone wants to use their individual budget to buy supports from a provider, we call it an Individual Service Fund (ISF).

Individual Service Funds mean that

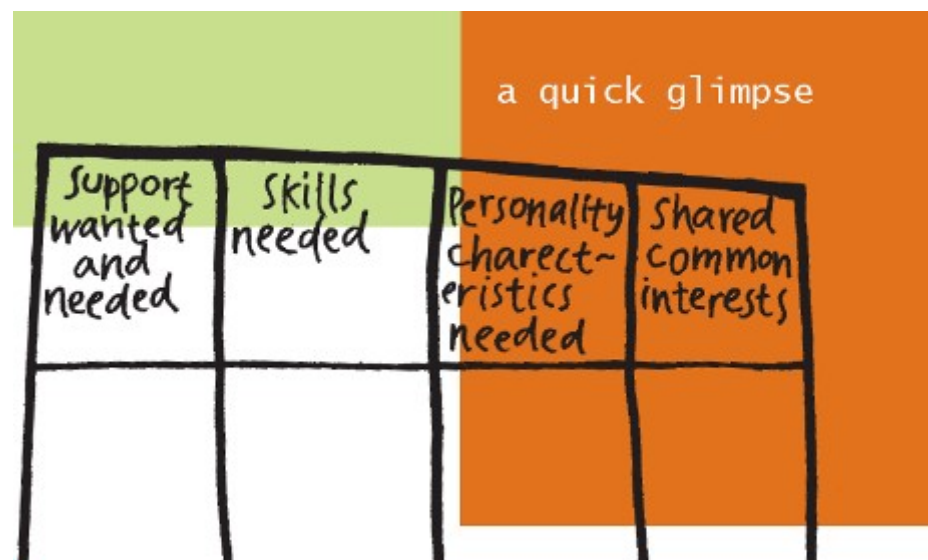
- The money is held by the provider on the individual's behalf
- The person decides how to spend the money
- The provider is accountable to the person
- The provider commits to only spend the money on the individual's service and the management and support necessary to provide that service (not into a general pooled budget).

There are two ways that providers can develop an ISF. One is to respond to individual commissions from care managers, individuals or their family or through commissioning. The other is to proactively transform the block contract monies that they receive and commit to using that money in an individualised way. Ideally this would be done in partnership with the commissioner, however, innovative providers can simply do this themselves and keep the commissioner informed. In this paper we look at how the support plan can inform who the best people are to provide support for the individual, what support staff need to be able to do, and what agreements are useful to have in place.



From a support plan to a person specification and job description

A good support plan will contain information about the best kind of person to support the individual. The person centred thinking tool 'Matching' can be very helpful here.

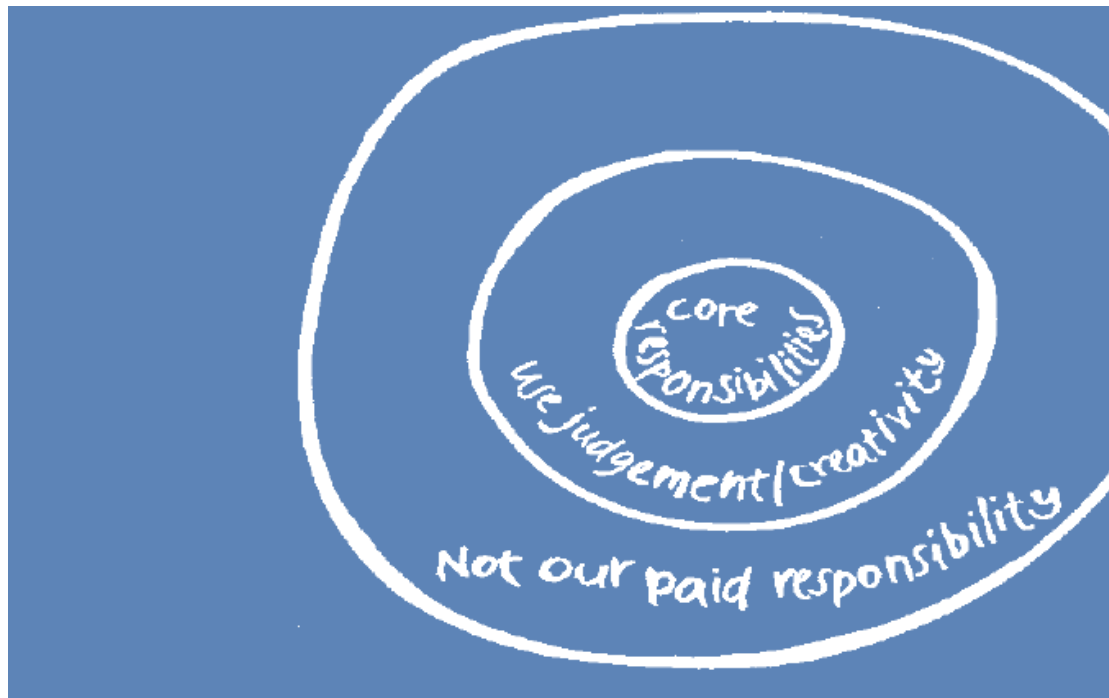


| Matching Staff Supporting: Alan | | | |
|--|--|---|---|
| Support wanted and needed | Skill needed | Personality Characteristics Needed | Shared Common interests (would be nice to have) |
| <ul style="list-style-type: none"> • Able to get out of the Oldham area e.g. Blackpool, Southport | <ul style="list-style-type: none"> • Full driving license • Able to go on motorways • To be a car driver | <ul style="list-style-type: none"> • Patience/ Confident | <ul style="list-style-type: none"> • They enjoy visiting places and travel |
| <ul style="list-style-type: none"> • Someone who will take Alan fishing | <ul style="list-style-type: none"> • Someone who can fish • Can handle <ul style="list-style-type: none"> - bait - maggots - worms | <ul style="list-style-type: none"> • Someone who enjoys <ul style="list-style-type: none"> • peace and quiet • Someone who is patient • Prepared to sit in the rain • Not squeamish | <ul style="list-style-type: none"> • Fishing • Angling interest |
| <ul style="list-style-type: none"> • Someone who can use computers | <ul style="list-style-type: none"> • Basic IT Skills • Able to problem solve | <ul style="list-style-type: none"> • Able to share computer knowledge • Willingness to learn | <ul style="list-style-type: none"> • Enjoys going on the computer |
| <ul style="list-style-type: none"> • Someone who enjoys going for a meal | <ul style="list-style-type: none"> • Able to engage with Alan where he wants to go. • Enjoys socializing | <ul style="list-style-type: none"> • Someone who likes to go out and about • Good communicator | <ul style="list-style-type: none"> • Someone who enjoys a nice meal in a pub/restaurant/cafe |

There is an example template for developing a Person Specification at the end of this document

The individual service fund is based on the right kind of person providing the right support. The support plan will have good information about the specific support that the individual requires – both what they want and when they want it.

The person centred thinking tool the ‘Doughnut’ can be helpful in clarifying which aspects of the individuals support are their core responsibilities, and where they can use creativity and judgement. We have found it helpful to base the job description around the keys to Citizenship as a way of organising the information from the support plan.



There is an example template for developing a job description at the end of this piece titled “My Support Workers Job Description”

From a support plan to an Individual Service Fund agreement between the individual and the provider

This agreement or contract describes how the service provider will support the individual, what the responsibilities are on either side, and how the agreement could be ended.

You will find an example at the end of this piece titled “Individual Service Fund Agreement”

From a support plan to an individual support agreement

The Individual Service Fund agreement provides the ‘big picture’ agreement, whilst the individual support agreement describes what

this means on a day to day basis. This would be the document that team leaders use in their supervision of support staff, to ensure that the individual is being supported in the way that they want to be. It takes the information from the job description and makes it into an agreement between the staff and the individual. It also makes it clear to staff what their responsibilities are to the team, and to the organisation. This could form part of the employment contract for each individual staff member.

You will find an example at the end of this piece titled “Individual Support Agreement”

Conclusion

A good support plan provides all the information to ensure that they have a personalised service paid for by their individual budget. This information provides the basis for personalised person specifications and job descriptions that then become the agreement between the staff, manager and organisation. This can form the basis of staff contracts, with appropriate further information to comply with employment law. The Individual Service Fund agreement describes the way that the individual service fund is used.

Getting these agreements in place is the first step for providers who want to offer self directed support. It is crucial that there is a robust process for reviewing them, and gathering learning about what needs to change, so that the agreements are ‘living’ and always reflect how the individual wants to be supported.

Template for Person Specification:

This document takes information from the support plan to design the role support workers need to play. This is described in the person specification.

TEMPLATE FOR PERSON SPECIFICATION

The sort of person I want to be my Support Worker



This form tells people about you and your needs and says what sort of person supports you best.

There are notes **in red** which will help you to fill in the form.

Information can be taken from my support plan and from a typical week for me.

MY SUPPORT

Please fill in this table. The word 'Essential' means must have and 'Desirable' means it would be good or nice to have

1. The Support I Want



**It is essential that I
have the following
support:**

**It is desirable that I
have the following
support:**

2. The Skills My Support Worker Must Have



Essential skills that my support worker must have are:

Desirable skills that my support worker must have are:

3. Personality: the kind of person I am looking for



It is essential that they are:

It is desirable that they are:

4. Shared Interests: things I like doing that I want my support worker to like too





Interests that it is essential that they share:


Interests that it is desirable that they share:





My Support Workers Job Description

This document takes information from the support plan to develop a job description

| My Support Worker's Job | | |
|---|--|--|
|  | | <p>This document tells you, my support worker, what you are being employed to do for:</p> <ul style="list-style-type: none">• me• my support team• my support organisation |
|  | | <p>There are notes in red which tell you where find more information.</p> |

A. Self-determination: I want you to help me be in control of my life.

| | | |
|---|--|--|
|  | | <p>1. I want you to support me to speak up for myself. You can do this by:</p> |
|---|--|--|

| | |
|---|---|
|  | <p>2. I want you to support me to make decisions and be in control of my life. You can do this by:</p> |
|  | <p>3. I want you to support me to communicate with other people. You can do this by:</p> |
|  | <p>4. I want you to support me to be at the centre of any meeting about me. You can do this by:</p> |
|  | <p>You can find more information about this in my support plan, communication charts and decision-making agreement.</p> |

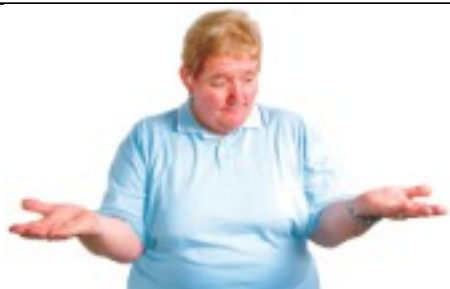
B. Direction: helping me to decide my future




1. I want you to help me think about my future and keep my Support Plan updated. You can do this by:



2. The things that are really important for you to do for me are:



3. The times when I would like you to have your own ideas and to make decisions are:

| | |
|---|--|
| | |
|  | You can find more information about this in my support plan, PATH or MAP |

C.My Money



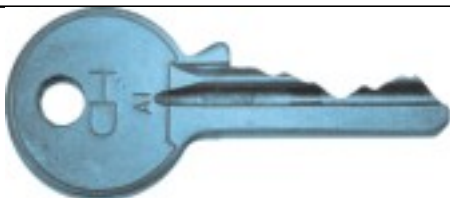
1. I want you to help me manage my money and my individual budget. You can do this by:



2. The things that are really important for you to do for me are:



3. The times when I would like you to have your own ideas and to make decisions are:



You can find more information about this in my support plan.

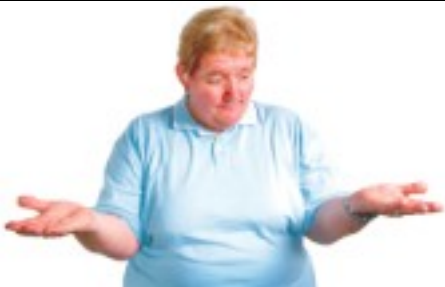
D. My Home



1. I want you to support me in my home and to help me stay healthy and safe there. You can do this by:



2. The things that are really important for you to do for me are:



3. The times when I would like you to have your own ideas and to make decisions are:

| | |
|---|---|
| | |
|  | <p>You can find more information about this in my support plan.</p> |

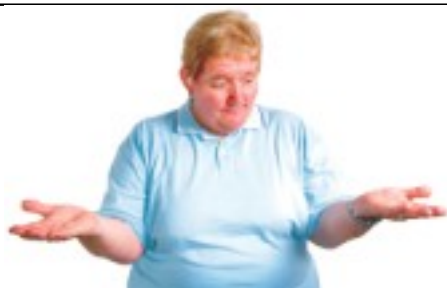
E. Support in my day-to-day life




1. I want you to support me in my day to day life and enable me to take risks. You can do this by:



2. The things that are really important for you to do for me are:



3. The times when I would like you to have your own ideas and to make decisions are:

| | |
|---|--|
| | |
|  | You can find more information about this in my support plan - 'To be successful in supporting me'. |

F. Support for being included in my community and with my relationships





1. I want you to support me to be included in my community. You can do this by



2. I want you to support me in my relationships. You can do this by:



3. The things that are really important for you to do for me are:

| | |
|---|---|
|  | <p>4. The times when I would like you to have your own ideas and to make decisions are:</p> |
|  | <p>You can find more information about this in my support plan, a week to a view and community map.</p> |

G. Your Responsibilities to my Support Team and their organisation



1. You are responsible for keeping information about me and for keeping my support plan updated.




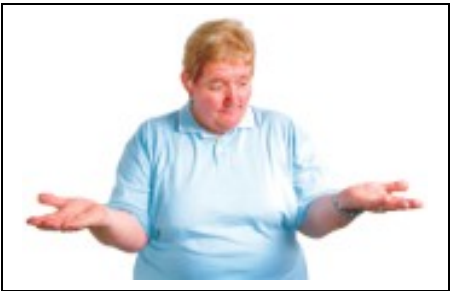
2. You must go to team meetings and supervision and speak up for me.



3. You must speak for me to the team, the team leader and in the organisation.



4. You are responsible for your own development in the job. You will be supported through training as follows:

| | |
|---|--|
| | |
|  | <p>5. The things that are really important for you to do (your core responsibilities) are:</p> |
|  | <p>6. The times when you should have your own ideas and to make decisions are:</p> |



You can find more information about this in the Team Plan, the Team Doughnut, the Team Communications Plan and in the organisation's Policies and Procedures.

Individual Service Fund Agreement



There are notes **in red** which help you to fill in the form.

This Agreement is made between:



Individual:
.....
[please write in your name here]

and

Service Provider:
.....
[please write the name of the Service Provider here]

1. Why are we making this agreement?



1. We are making this agreement because:

- you are using your individual budget to buy services from your service provider **or**
- your service provider is making new personal agreements with the people he provides services for **or**
- the local authority is buying services from this provider for you.

2. What your Service Provider agrees to do



2. Your Service Provider agrees to do the following things for you:



- Support you to have the life that you want as you have described in your support plan.



- Work with anyone that you choose to speak up for you. This could be your family, friends, advocate or someone from your circle of support



- Only use your individual budget to support you, **except for:**

the service provider's company and management costs which are

.....
[please write the amount of the service provider's management costs here]

and

the money that the service provider keeps safe for emergencies which is

.....
[please write here the amount of money (contingency fund) the service provider keeps safe for emergencies]



- Review your service with you every year. You can invite the person who speaks up for you and any other people that you invite.

At this meeting you can make changes to your support plan and think about how you use your individual budget.



- Keep up to date records on how your money is being spent and share them with you at each review or when you ask



- Review your service with your support staff and their manager regularly



- Help your staff support you well by:
 - having a one to one meeting with every member of your support staff team every 6 weeks
 - having team meetings for your support team every 2 weeks
 - providing training for staff so that they can support you well and keep you healthy and safe



- having rules and ways of doing things that help staff to support you well
- helping staff to think about things the organisation does well, what it could do better, and how to improve the service that it provides to you

The service provider will do all the things that are in your individual support agreement.

3. What you agree to do



3. You agree to do the following things:



- Telling the manager and staff what you think about your service



- The service provider would like you to tell him how he could make his service to you better.



- The service provider has a compliments and complaints procedure which describes this in detail.



-

[Please write here any other things that you agree to do (if there are any)]

4. Ending this Agreement



4. Ending this agreement



- You and the service provider agree to tell each other one month before either of you wants to end this agreement.



- The service provider will continue to support you until you have found another provider or service.



- The service provider will provide help and support to your new provider to help you with the move

Your Signatures



I AGREE:

[please sign your name here]

WITNESSED:

[please ask the person who sees you sign to write his or her name here]



YOUR SERVICE PROVIDER AGREES:

[the Service Provider signs here]



WITNESSED

[please ask the person who sees the Service Provider sign to write his or her name here]

DATE OF SIGNING:

Individual Support Agreement

This document is the support agreement between the individual and his/her staff. It is based on the support plan.

Individual Support Agreement




There are notes **in red** which help you to fill in this agreement.



This agreement says how I want to be supported and the responsibilities of the organisation and staff in providing this support.

This Agreement is made between:

| | |
|---|---|
|  | Individual: [please write in your name and address here] |
| | and |
| | Organisation: [please write the name of the Organisation here] |

In return for payments already agreed, the Organisation promises to:

A. Help Me to be in control of my life - this is called Self-determination. The Organisation will do this by:







1. Supporting me to speak up for myself. You can do this by: [explain here how you want to be supported to speak up for yourself]











2. Supporting me to make decisions and be in control of my life. This includes who I live with (if anyone) where I live, and who supports me. You can do this by: [explain here how you want to be supported to make decisions and be in control]







3. Supporting me to communicate with other people. You can do this by: [explain here how you want to be supported to communicate]





| | |
|---|---|
|  | <p>4. Supporting me to be at the centre of any meeting about me. You can do this by: [explain here how you want to be supported to be at the centre of any meeting]</p> |
|  | <p>You can find more information about my needs in my support plan, communication charts and decision-making agreement.</p> |
| <p>B. Help me to decide my future (Direction). The Organisation will do this by:</p> | |
|  | <p>1. Helping me think about my future and by keeping my Support Plan updated. You can do this by: [explain here how you want to be helped to think about your future]</p> |
|  | <p>2. Doing the things that are really important to me. These are: [explain here what things are really important]</p> |





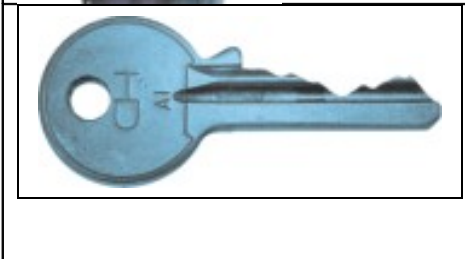
| | |
|---|---|
|  | <p>3. Sometimes you should have your own ideas and make decisions. These times are: [explain here when you want your support worker to make decisions]</p> |
|  | <p>You can find more information about this in my support plan, PATH or MAP</p> |
| <p>C.Help Me With My Money. The Organisation will do this by:</p> | |
|  | <p>1. Helping me manage my money and my individual budget. You can do this by: [explain here how you want to be helped with your money]</p> |
|  | <p>2. Doing the things that are really important to me. These are: [explain here what things are really important]</p> |

| | |
|---|---|
|  | <p>3. Sometimes you should have your own ideas and make decisions. These times are: [explain here when you want your support worker to make decisions about your money]</p> |
|  | <p>You can find more information about this in my support plan.</p> |
| <p>D. Support Me in My Home. The Organisation will do this by:</p> | |
|  | <p>1. Supporting me in my home. This means helping me manage my tenancy and understand my rights and responsibilities as a tenant or homeowner. Make sure that I control what happens in my home and this includes who has keys and who can come in. Help me stay healthy and safe at home. This includes You can do this by: [explain here how you want to be supported in your home and helped to stay healthy and safe]</p> |
|  | <p>2. Doing the things that are really important to me. These are: [explain here what things are really important]</p> |

| | |
|--|---|
|  | <p>3. Sometimes you should have your own ideas and make decisions. These times are: [explain here when you want your support worker to make decisions]</p> |
|  | <p>You can find more information about this in my support plan.</p> |
| <p>E. Support me in my day-to-day life. The Organisation will do this by:</p> | |
|  | <p>1. Supporting me in my day to day life and enabling me to take risks. You can do this by: [explain here how you want to be supported in your day-to-day life and to take risks]</p> |
|  | <p>2. Doing the things that are really important to me. These are: [explain here what things are really important]</p> |

| | |
|---|--|
|  | <p>3. Sometimes you should have your own ideas and make decisions. These times are: [explain here when you want your support worker to make decisions]</p> |
|  | <p>You can find more information about this in my support plan - 'To be successful in supporting me'.</p> |
| <p>F.Support Me to be included in my community and my relationships. The Organisation will do this by:</p> | |
|  | <p>1. Support me to be included in my community. You can do this by: [explain here how you want to be supported to be included in your community]</p> |
|  | <p>2. Supporting me in my relationships. You can do this by: [explain here how you want to be supported in your relationships]</p> |

| | |
|---|---|
|  | <p>3. Doing the things that are really important to me. These are: [explain here what things are really important]</p> |
|  | <p>4. Sometimes you should have your own ideas and make decisions. These times are: [explain here when you want your support worker to make decisions]</p> |
|  | <p>You can find more information about this in my support plan, a week to a view and community map.</p> |
| <p>G. The Organisation also promises to:</p> | |
|  | <p>1. Keep information about me and keep my support plan updated.</p> |

| | |
|---|---|
|  | <p>2. Make sure my support worker goes to team meetings and supervision and speaks up for me.</p> |
|  | <p>3. Make sure my support worker speaks for me to the team, the team leader and within the organisation.</p> |
|  | <p>4. Help my support worker and team develop through training</p> |
|  | <p>5. Keep my support worker and team updated with all relevant policies and procedures</p> |
|  | <p>You can find more information about this in the Team Plan, the Team Doughnut, the Team Communication Plan and in the organisation's Policies and Procedures.</p> |

Our Signatures



I AGREE:

[please sign your name here]

WITNESSED:

[please ask the person who sees you sign to write his or her name here]



THE ORGANISATION AGREES:

[the Organisation's rep signs here]



WITNESSED

[please ask the person who sees the Organisation's rep sign to write his or her name here]

DATE OF SIGNING: