

# **Towards Personalised Budgets for People with a Disability in Ireland**

Report of the Task Force on  
Personalised Budgets

Plain English

June 2018

## **What is this report about?**

The Task Force on Personalised Budgets put together a report on their work. This is a Plain English summary of the report.

This report will:

- talk about the Task Force on Personalised Budgets
- explain the work the Task Force has done
- say what the Task Force thinks should be done to introduce personalised budgets in Ireland

## **Introduction**

Personalised Budgets can provide individuals with disabilities with more choice and control over the services and supports they get.

A personalised budget is an amount of funding that a person with a disability can get from the Government for their supports and services. They can make their own arrangements to meet their support needs, instead of having their needs met directly for them by the State.

People with disabilities can choose to get a personalised budget or not. People with disabilities can also choose to keep their traditional services from the HSE or a HSE funded service provider.

## **The Task Force on Personalised Budgets**

The Taskforce is made up of 2 groups:

- The Strategy Group : a policy group to lead the work
- The Advisory Group : a group to give advice and ideas on the policy

A Reference Group including people who live with a disability was also set up. This Group told the Task Force what they thought about personalised budgets.

The job of the Task Force was to recommend models of personalised budgets. These models should give people using a personalised budget more control, choice and independence in getting services that meet their needs.

The job of the Task Force was to think about personal social services and supports for adults funded by HSE Disability Services. It does not include clinical services currently provided by the health services (such as medical services and therapy supports), or general living expenses.

## **Vision of the Task Force**

A vision is an idea for the future.

The vision of the Task Force is that personalised budgets will support people with disabilities to:

- have choice and control over their lives
- have choice and control over the supports they get
- be independent
- take part in their communities

The Task Force felt that personalised budgets should support choice; dignity, empowerment, equality, independence, person-centredness, and respect.

## What work did the Task Force do?

The Task Force carried out different pieces of work to find the best ways to introduce personalised budgets in Ireland. These included:

- A review of the information on personalised budgets in other countries. It looked at the people eligible, the types of supports and services available and the challenges, successes and obstacles experienced.
- The Task Force looked at the costs of personalised budgets in other countries. It found that there was a risk of increasing expectations and demand. This could lead to higher costs if not carefully managed. A number of other costs must also be considered when introducing personalised budgets. There must be funding at the set-up stage to develop new systems, train staff, and to test and evaluate the new systems.
- The Task Force collected information about a small number of people using forms of personalised budgets in Ireland.
- The Task Force asked people in Ireland:
  - what they thought about personalised budgets
  - what they expected from a personalised budget
  - what a personalised budget might involve
  - what supports they would need to use one

## The Model: Steps to get a personalised budget

The Task Force said that someone getting a personalised budget should follow certain steps.

An assessment of the person's needs should happen first. Then, there are five main stages:

1. **Information on Supports** - The person will get information about how a personalised budget could work for them. This would help them decide if they want a personalised budget or not.
2. **Application** - The person would apply to get a personalised budget. They can work with a person called an assessing practitioner to find out how they can use it.
3. **Support and Planning** - The person and the assessing practitioner will agree their personalised budget support plan. The person will decide between the different ways that a personalised budget can be paid.
4. **Using the personalised budget** - The person will decide how they would like their personalised budget to be paid.
5. **Checking how it's working** - This is called the 'review' stage. The person doing the review would check:
  - how the person feels their budget is working
  - how the money is being spent
  - if the budget is supporting the person to achieve their goals

After the review, the personalised budget might be changed to better suit the person's needs.

## What did the Task Force say?

The Task Force made 18 main recommendations. These are divided into five main themes and outline the framework for the introduction of personalised budgets in Ireland.

### National Framework for Personalised Budgets

- A personalised budget can be used to support a person with everyday life. This might mean support to take part in the community, personal assistance or home care support
- A personalised budget cannot be spent on:
  - General living expenses. These are things like bills, food and drink, mortgage or rent and insurance
  - Services given by other Government Departments or agencies
- A personalised budget can be given to a person in 3 different ways:
  1. The person can manage it themselves. This is called a self-managed fund.
  2. The person can manage their personalised budget together with the HSE or a disability service.
  3. The person can ask a person called a broker to manage their budget for them. A broker gives the person the information, support and help they need to plan their services and supports.

## **Operation of Personalised Budgets**

- A standardised assessment tool should be used to decide funding. This should include a tool to measure support needs.
- The operation of personalised budgets will follow the five stages described earlier.
- The governance of personalised budgets will follow the guidelines in Chapter 7 of the Task Force report. The level of governance will vary depending on the payment option and on the amount of the personalised budget.
- A detailed spending plan will be agreed by the assessing practitioner and the person (or their family or other support network as appropriate). This will say how the individual's support needs will be met.
- This plan will take into account the natural supports that are provided through family, community or other state supports.

## **Supports for Individuals**

- Individuals will need guidance and support to consider and apply for a personalised budget. A standardised training package on managing a personalised budget should be made available. Training should include a focus on employment law, finance and employment relations.

## **Demonstration Projects**

- The Department of Health and the HSE should set up demonstration projects to test personalised budgets. These projects are needed before the final design for a personalised budgets system in Ireland can be decided.
- The projects should test a number of issues such as:
  - different payment options
  - the costs of running a personalised budget for the individual
  - quality assurance
  - employment issues
  - financial sustainability in Ireland
- The demonstration projects should be carried out over a two year period from the date of publication of the Task Force Report.
- The projects should be evaluated at the end of the two years.
- The Department of Health should look at the evaluation report and make recommendations to Government. They will say what needs to happen next to make personalised budgets available in Ireland.

## **Other**

- Information from the demonstration projects should be used to develop guidelines on the best ways to start using personalised budgets in Ireland.
- The Department of Health should work with other Government Departments to decide if the law needs to change to make a personalised budget work.

- The Department of Health should give information on personalised budgets as part of the work on the National Disability Inclusion Strategy.
- Information from the demonstration projects should be shared with other Government Departments.