

Third Sector Leaders

ACEVO

How to Cost Appropriately with Personal Budgets



Written by

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consultancy



improvingsupport.org.uk/income

A joint initiative to strengthen support services for the third sector

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What is personalisation?

Personalisation is the process by which state-provided services are adapted to meet the needs of the service user. Personalisation is intended to improve outcomes by giving people more choice and control over their support and is part of the government's wider agenda to improve the efficiency and responsiveness of public services. Personalisation is proposed as a means to move away from a 'one size fits all' approach towards service provision.

What is the history of personalisation?

Personalisation itself is not a new idea and has its origins in the disability and independent living movements of the 1970s and 80s, which have long campaigned for greater choice and control and empowerment to service users. Current thinking and practice around personalisation is very much influenced by these early movements and in particular by the work of charity In Control, which has pioneered the individual personal budgets model.

The IBSEN pilot programmes from 2005-2007 in 13 local authorities across England indicated that personal budgets can enhance a sense of individual wellbeing, and also indicated that the option costs were no greater than conventional services.

In 2007 the government released the "Putting People First" White Paper which set out a commitment to create more personalised services to users of social care. Putting People First proposes a system of individual and personal budgets where service users purchase their own provision and design solutions around their particular circumstances. It also encompasses the shift towards early intervention and prevention work. Following on from this and IBSEN, social service departments are now introducing individual and personal budgets to service users to organise and purchase their own support.

What is the new assessment process for personalised budgets?

Under this new system service users are given a needs-based indicative budget which they can use to devise their own care plan based on their individual priorities and goals. Budgets are set using a locally defined Resource Allocation System (RAS). Individuals then design their own plan, with or without support from statutory or voluntary agencies, and submit this to their statutory care manager.

The plan is then reviewed by local authority care managers, who consider the level of risk and possible adult safeguarding concerns before the money is released. Budgets are flexible and as long as they're spent on legal services and activities that improve quality of life, there are few limits on expenditure.

Users can opt to continue receiving their existing provision or commission entirely new services based on their specific needs and preferences. They can also elect for their budget to be managed by the local authority or another appointed individual or organisation on their behalf.

What are the different types of individual budget?

Individual budgets are a needs-based allocation of money to service users that can combine several funding sources, such as social care money, independent living and supporting people funds, disabled facilities grants and access to work.

Individual and personal budgets can be deployed and managed in a variety of ways:

- as a cash payment paid directly into a user's bank account;
- as a virtual budget where the council can continue to organise service provision and manage the budget for a user on their behalf;

- as managed fund held by a lead professional;
- as an individual service fund where the money is given to the service provider agency e.g. a care agency;
- as a brokered fund held by an organisation that is not providing a service;
- as an indirect fund or third party trust where organisations or individuals - often family members or friends - are chosen to administer and manage this money for a user;
- as vouchers to be used on approved services.

What is the current statutory progress on implementing individual budgets?

Different local authorities are at very different stages of the process. However, all adult social service departments in England are expected to make significant progress in implementation by 2011, with 30% of their service users on personal budgets. A 3-year ring-fenced social care reform grant totalling £520 million was made available to local authorities in 2008 to help them make this transition.

A 2009 survey by ADASS shows that 90 local authorities (13%) currently have systems in place allocating individual and personal budgets to all service users.

A further 51 local authorities (31%) have systems in place allocating individual and personal budgets to some service users, and this is frequently people with learning difficulties and physical disabilities. On 31 March 2009 almost 93,000 people in England were receiving personal budgets, including direct payments.

However, the survey also means that nearly 60% of local authorities haven't started to properly address personalisation. There is also no equivalent survey for providers!

We are approximately 18 months into a 3-year transformation programme, although as one writer put it, “it feels like 3 weeks”, and it seems apparent that implementation will take longer than originally planned.

What are the financial opportunities?

In some ways personalisation is the ultimate diversification of income! There are many potential benefits for providers:

- providers can deliver services that are really wanted and needed, and hence purchased to a greater extent. Which services do clients perceive as low value and why? As with any business we need to sell the customer what they need and want rather than what we've got;
- providers can see their 'real' position in the market, and hence make more effective strategic decisions based on more accurate market knowledge – will they be Tesco, Harrods or the local shop? Should they specialise?
- there are opportunities for new services; for example the provision of effective advice, brokerage and representative services, or advising on and brokering the recruitment of personal assistants, or on criminal records status;
- there are opportunities to develop new income sources, and it may facilitate a move into new clients including self-funders;
- staff options, career development and motivation may be enhanced;
- it will promote 'a new mutuality' through the need to work with new partnerships and consortia to meet existing needs or to fill gaps, or facilitate specialisation. Providers will need to be able to sub-contract with others if they are better placed to provide specific aspects of a person's support;
- There may be opportunities for providers to gain financial and non-financial support from commissioners to assist them in the change process, such as training in accountancy, grants to develop technology systems to assist with administration, or even taking on payroll functions for providers.

Personalisation is not entirely new; providing holistic and tailored services is something that the VCS has historically prided itself on. It is a mindset and can be developed anywhere. However, the clarion call is to take it to the next level.

What are the main financial challenges and risks in relation to individual budgets?

We are dealing with a fundamental new equation:

Flexible budgets = flexible services

We are also dealing with a major paradigm shift in the business model from being Business to Business (B2B) operations, which rely on comparatively large agreements with say local authorities, PCTs and charitable trusts, to essentially what are retail operations where we are marketing, selling and delivering to individual customers.

Individual budgets give service users an unprecedented level of autonomy. All of this has major ramifications for the way in which every voluntary sector organisation operates. The strategic challenges for VCS organisations are therefore to:

- make services and products more customer focussed;
- place greater emphasis on outcomes instead of tasks and outputs;
- frame and manage service users' expectations.

The main financial challenges are to:

- design flexible organisational infrastructures and services;
- make much more creative use of both paid staff and volunteers;
- create and fund more innovative marketing strategies;
- effect culture changes and facilitate enterprise environments;
- address increased complexity and fragmentation in income sources;

- co-ordinate timing issues such as intermittent and irregular uptake, cancellation and withdrawal at short notice;
- manage the transition from existing block contracts, including cashflow and new credit control issues;
- deal with questions of variable scalability, and minimise variable costs in a period of uncertain take up;
- develop more sophisticated and more immediate forecasting models to control risk;
- improve financial reporting and literacy in order to speed up strategic decision- making on profitable and non-profitable activities;
- negotiate for transparency regarding LA Resource Allocation Systems.

Personalisation also poses challenges in terms of the practical elements of costing services, unit costing, organisational cost centres, introducing new payment processes and providing financial stability.

Providers' internal systems and processes must be geared to handling more complex and voluminous administration. Re-costing services on a unit or individual basis will also be necessary in order to price individual services. This may call for more investment in IT systems, administration, back-office functions and financial staff.

Some general points about the transition to personalised budgets

Whilst adapting systems and processes to meet the requirements of micro-commissioning and a potential 24-hour business appears frightening, there is evidence to suggest that changes in demand for services are likely to be gradual rather than dramatic. Psychologically budget holders continue to purchase similar support to their previous arrangements until they feel more confident and comfortable. This means that we are likely to be working in a mixed economy and through several years of transition.

Consequently, in some cases contracts will continue to be operated between service providers and local authorities, through, for example, virtual budgets or individual service funds. Here a blocked contractual arrangement can be effectively divided up into a number of individual support packages.

How can commissioners help the transition?

A key task for commissioners is to invest and build capacity in the provider market.

Some councils are using part of their social care reform grant to stimulate the local market by awarding funds in grants to service providers pioneering and innovating person-centred services.

Commissioners need to support existing services where they are working well. Balancing investment between new and existing services is important to ensure that people who want to continue receiving traditional provision are not disadvantaged.

The success of market shaping depends on building effective partnerships with service providers. Key to building effective partnerships for personalisation is to develop and grow a culture of trust across the provider-commissioner boundary.

What is the journey for providers? Public bodies must be clear about their strategies for developing and implementing personalisation and establish effective channels of communication to share their strategies with providers, service users and other key stakeholders.

Providers must be given sufficient notice so that they can participate effectively. There is particularly need for information about timescales for the implementation of personal and individual budgets and scope of their use. Maintaining financial support and funding channels for the VCS is also important to help them through the transition.

What are some of the financial strategies we can adopt to address personalisation?

In this context it is not really possible or advisable to divorce the strategic from the financial options.

The options for overall and financial strategy need include:

- getting even closer to your commissioner!
- exploring and developing partnerships and collaborations NOW;
- talking to local third sector organisations with experience of delivering personalised services/operating personal budgets, such as your local disability organisation;
- thinking of your organisation as a new retail social enterprise, talk to your local Age Concern who are likely to have considered the options for enterprise and on-selling;
- understanding and researching your own clients' needs and aspirations;
- engaging widely with user-led organisations for the same reason - they are the expert users;
- recognising your own operation's existing costs in detail;
- updating and re-writing your business plans and financial forecasts;

- reflecting in simple financial terms like a Finance Director;
- planning for a mixed economy of income;
- avoiding being investment-shy – to some extent you have to speculate to accumulate;
- writing a proper and comprehensive marketing strategy, learning how to sell to a new audience of service users;
- communicating well and often with your staff, developing a Personalisation Transition Plan in collaboration with them.

Drilling down into some of these a little more...

In terms of commissioners, remember that they are struggling with personalisation just as much as you are. Providers also need to engage early with local statutory bodies to find out about their strategies for the implementation of personal and individual budgets and work with them to negotiate changes to contracts. Endeavour to work with them and be seen to be helping them. Embed yourself in their work, and rather than passively waiting to see what they do, endeavour to influence the shape of personalisation in your area. Ask commissioners how they are spending their Adult Social Care Reform Grant and firm up your relationships with care managers.

The primary purpose of partnerships, consortiums and collaborations is to give your organisation maximum flexibility, to provide diversity, increase market knowledge and give yourself the option to specialise. VCS organisations often pride themselves on providing for clients' holistic needs, but in endeavoring to do this, are they realistically just being jacks of all trades rather than masters of none? Some organisations may be well placed to expand their services and branch out to a wider pool or range of users, while others may be better placed to use their expertise to offer a more specialist and focused provision. Many VCOs already work as niche specialist providers delivering a wide choice of highly personalised services that other mainstream providers find hard to match.

A finance director will think in very simple business terms, i.e.:
Is this service making a profit or a loss?
If it's making a profit, how can we increase this?
If it's making a loss, can we reduce costs or increase income?
If we can't do this, is there a viable market in this area or not?
Can we find another way of doing it, or should we exit the market?

This links in to the idea of thinking of a service as a business or new retail social enterprise. If you were starting your own new retail business how would you do this differently, and what would people want? This is particularly important given that there are opportunities to develop much greater work with self-funders, but you need to think about why they would spend their own money with your organisation.

This commitment to a customer-first enterprising way of thinking also includes questions such as:

- Do we make it easy for clients to contact us and BUY from us?
- Is the service set up to deal with changing demand? E.g. if demand for a service slows or contracts will the organisation still have to pay the salary of the staff?
- Does the service have effective productivity levels? Are salaries too high or too low for a sustainable business model?
- Are we offering the full range of services customers want and which could be offered?
- Is awareness of our services amongst potential clients adequate?

Finally, we need to think about and perhaps moderate our attitude to risk. The voluntary sector has only just become accustomed to borrowing money, but it also needs to take the next step into positive investment. Any new business needs capital, entering new markets or penetrating existing markets

costs money, and there will be fewer opportunities for investment-shy and risk-averse shrinking violets.

Why is a marketing strategy so important?

The shift away from local authority commission services to micro-commissioning means providers will also need to market directly to individual service users. This is a paradigm shift from a business to business model to a retail model. Effective marketing is therefore crucial to the success of personalisation, and will mean we need to learn how to sell to new sets of customers (some of whom, say young people and older people, may have different needs).

Those organisations which present themselves as responsive and supportive are likely to be the most successful. You need to be selling what the customer wants, not what you've got!

Understanding clients' needs and desires is therefore absolutely key and so comprehensive market research is vital. Talk ad infinitum to your own existing users; they are the experts and they are already loyal users. Get to know their needs and aspirations in order to forecast what they want to buy and what you can improve.

Think about if it was YOU in need, and use marketing tools such as the 'I Test', three very simple but very powerful questions to analyse a service or product:

Would I honestly buy it?

Could I realistically sell it?

Would I invest in it?

What expenditure costs are likely to be affected by personalisation?

The effects and costs of implementing personalisation are unknown and there is currently no known research. However, common sense indicates possible effects on a wide range of costs. Some of these may present savings, particularly regarding premises, and possibly in the longer term in relation to flexible staff contracts.

Costs checklist

Advocacy/ Brokerage	<ul style="list-style-type: none">• Particularly the start-up costs of establishing a new service and infrastructure
Marketing	<ul style="list-style-type: none">• Marketing strategy (for what is essentially now both retail and B2B)• Multiple target audiences/communication channels (service users, but also carers, families, brokers etc)• Market research/competitors• Service user consultation• Networking• Branding• Website and literature amendments• Selling
Training staff	<ul style="list-style-type: none">• Allocating staff time to selling
Facilities & Equipment	<ul style="list-style-type: none">• New premises or vacation of premises• Refurbishment or redesign• New equipment such as tools, mobiles, PDAs, telecare, alarms• Uniforms, badges etc
Legal	Contracts with service users and partners Complaints and dispute resolution

Administration	<ul style="list-style-type: none"> • Phone and written contacts • Rota and rostering – shift from managing set to sessional hours <p>Additional client contacts, calls and emails</p>
Finance	<ul style="list-style-type: none"> • The development of new processes and systems • Transaction costs e.g. number of separate invoices and payments • Designing new cost centres, costing multiple services <ul style="list-style-type: none"> • Managing cashflow • Credit control • Creating “Scenario” budgets
Information Technology	<ul style="list-style-type: none"> • In tandem with finance, creating new data recording systems and tracking • New staff and customer communications and contact systems
Management	<ul style="list-style-type: none"> • Negotiating new employment contracts • Work with staff to implement working practice changes • Revising business and strategic plan
Governance	<ul style="list-style-type: none"> • Additional meetings, specialist sub-committees
Insurance	<ul style="list-style-type: none"> • Wider range of delivery tasks with different levels of risk
HR and Staffing Recruitment	<ul style="list-style-type: none"> • Training staff in selling and account handling • Staff retention and new benefits • Amended flexible contracts and T&Cs • Amended HR policies
Partnerships	Time cost to develop multiple delivery agencies

What are the implications for staff and management?

Personalisation requires the development of a flexible person-centred workforce. Personalisation is highly likely to require changes to staff working patterns as users may require support at different times, where they may request support later at night or early in the morning.

Strategic questions include whether service users may want to change individual personal care assistants or providers on a regular basis, whether staff may be working for several organisations at once, or where providers may lose some staff to personal budget holders who are able to attract them into Personal Assistant posts.

This could involve a significant culture change for some providers and staff may have to adjust to new ways of working. For example, staff may need to be prepared to change from providing a single service - for example, nail cutting - to providing support with a wide range of services including shopping, walking, outings and engagement in social activities. In most cases front-line staff may need retraining to develop person-centred skills.

Note that for staff, this may be as much about what they want personally to do with their lives, as much as how it effects the organisations they work for. As well as being willing and able to provide a wider range of services, personal initiative may come to the fore: it will be vital to prioritise relationships with clients, and the role of front-line workers in this is key, and indeed they may even create their own brand to sell themselves individually to clients.

How might personalisation affect our existing cost centres and drivers?

Whilst we need to be mindful that for service users, personalisation equals liberation, and is not just an accounting exercise, whatever happens, we know that as voluntary sector organisations we still need to cover our total costs.

Costs centres are traditionally defined according to a number of main categories; for example, according to operational function (service, finance, management etc), physical location, funding source, SORP restricted or unrestricted, and/or some combination of these.

In reality, these methodologies are unlikely to change, but they may need to become more sophisticated. In addition an additional category may need to be added to reflect not simply the discrete but broad services an organisation may have (such as day care, residential, home care), but also the more numerous individual services that service users may elect to purchase within those broad categories (for example within a home care service, users may be purchasing bathing, nail cutting, gardening, handyman services etc).

How many different services do we need to cost?

In reality you may not need to cost every new service separately. Taking the example of a home care service, where clients may be asking for, say, 20 or 30 different services, it is feasible to group services which have a similar staffing and materials level into the same costing. Detailed analysis is only beneficial where it is actually useful and economic to produce it, and many service costs will be very similar given that the major cost is usually staffing.

In terms of the rationale for allocating costs, this is also a good time to check that your existing cost drivers - for example headcount, floorspace, expenditure - still make sense, and that the subsequent reports based on these still provide the management information you need.

Do we need new accounting software?

In reality most modern accounting software is perfectly able to cope with these changes (as well as the anticipated increase in transactions and individual entries) but remember that there will be additional implementation time both to set up these new cost centres, and increased accounting and management time spent on a daily or weekly basis on accurately allocating expenditure and income into these new categories, and then on analysing the results.

This also means that those organisations currently reliant on quarterly reporting may need to move to monthly reporting to reflect the need for faster decision making.

If you do not have the expertise in house, then there are a wide range of accountants and consultants who can support you in this.

What are Unit Costs and Unit Prices?

If we want to be sustainable organisations then we need to be very clear on our unit costs and prices, to ensure that our organisations continue to make surpluses. Fundamentally here remember that 'price' relates to total income, whereas 'cost' relates to total expenditure.

Unit cost is the actual cost of delivering one unit of care however we define that, whether it's 1 hour or 1 day or a package of support. This figure is normally calculated as our total expenditure divided by 1 unit. Setting and controlling costs is usually an internal function.

Unit price is what we charge the customer, and is normally calculated as our total expenditure divided by 1 unit. Note however that normally (outside of a monopoly or cartel) the price is usually controlled by the marketplace, the price that customers are prepared to pay.

The difference between the unit cost and the unit price is the basis of the crucial strategic decision of whether we decide to enter a market or not, i.e. whether it's profitable or not.

What is the difference between average and marginal costs and why does it matter?

Most traditional costing methodologies rely on the principle of average costing. This identifies the average cost of providing an additional single unit, as identified above as the existing total cost divided by the number of units.

This methodology is absolutely fine for most purposes, particularly for many organisations in the VCS with comparatively static budgets and few seasonal or major contractual variations.

However, the transition to personalisation represents a period of uncertainty and rapid change and in this example we need to be mindful that sometimes providing an extra unit of care can be much more expensive.

Take the example of a car sharing scheme below:

In the example below in table 1, one person is being carried in a car journey which costs £120. The total car cost, average cost (total car cost divided by one person) and marginal cost (increase of one person) are all the same at £120.

Table 1

People	1	2	3	4	5	6
Car costs	£120					
Averagee	£120					
Marginal	£120					

However in table 2, the car is now carrying 4 people. The total car cost is the same at £120. The average cost has reduced to £30, (£120 divided by 4 people), but the marginal cost is for passenger 2, 3 or 4 is nil because there has been no increase in the total cost (by having extra people in the car).

Table 2

People	1	2	3	4	5	6
Car costs	£120	£120	£120	£120		
Averagee	£120	£60	£40	£30		
Marginal	£120	Nil	Nil	Nil		

However in table 3, five people are now being carried and a new car is required. The total car cost has now doubled to £240 for two cars. The average cost has now gone up somewhat to £48. But the marginal costs have increased substantially to £120, which is the extra cost of providing just one extra place or unit.

Table 3

People	1	2	3	4	5	6
Car costs	£120	£120	£120	£120	£240	
Averagee	£120	£60	£40	£30	£48	
Marginal	£120	Nil	Nil	Nil	£120	

Essentially the distinction between average and marginal costs is an *aide memoire!* In an environment where we need to make fast decisions and our operations needs to be scaleable, we need to ensure that we do not make significant errors of judgement in relation to what may accidentally involve step changes in costs.

What are our other options for costing methodology?

Traditionally full costs analysis makes a distinction between direct and overhead costs, i.e. those that are wholly and solely attributable to one discrete service and those that are not. However just as important in the context of personalisation is the distinction between what are fixed and variable costs.

In essence, fixed costs are those that we cannot change, however much we deliver. For example, we may have a large permanent building which needs maintaining. Variable costs are those that can vary depending on how much we are delivering. We have at least some control over them – staffing, for example (particularly sessional and temporary staff).

Linked to this, it is fair to say that one of the paradigms that have changed with personalisation is that services are defined bottom-up by the service user, rather than being largely dictated by the provider or commissioner.

Linking both these ideas of variable cost and a bottom-up approach is the idea of Activity Based Costing (ABC costing).

What is ABC costing?

Briefly, ABC costing is a system for assigning costs to products based on the activities they require. The concepts of ABC costing were theorised by Kaplan, and developed in the manufacturing sector of the United States during the 1970s and 1980s. Essentially, once total costs have been identified, the cost of each activity is attributed to each product to the extent that the product uses the activity.

Accountants assign 100% of each employee's time to the different activities performed inside an organisation (many will use surveys to have the workers themselves assign their time to

the different activities). The accountant then can determine the total cost spent on each activity by summing up the percentage of each worker's salary spent on that activity. An organisation can use the resulting activity cost data to determine where to focus their efforts.

ABC costing is considered a relatively time-consuming and costly accounting methodology. However, in a time of great change, and used as a temporary methodology, it can provide a useful check and balance on traditional standard costing techniques. It also provides an opportunity for delivery and non-finance staff to be engaged in considering the relationship between activities and costs, and indeed cannot be undertaken without their help. For those organisations whose budgets are based simply on many years' historical information, it can be a very interesting and useful exercise to cost any new service, or revisit any given existing activity from the bottom up, to re-examine its constituent parts.

Scenario planning & forecasting

In an environment of change where greater flexibility is required, a commitment to forecasting and constant re-modelling of demand and supply, particularly by managers and finance staff, will be extremely important.

“We can either stumble into the future, and hope it turns out alright, or we can try and shape it. To shape it, the first step is to work out what it might look like.”

Anonymous

Scenario planning (which is also known as sensitivity analysis) is a strategic planning tool used to make flexible long-term plans. It is a method for learning about the future by understanding the

nature and impact of the most uncertain and important driving forces affecting our world.

Many of the regular methods for strategy development assume that the world in three to ten years' time will not significantly differ from that of today and that an organisation will have a large impact on its environment: they assume we can mould the future. Scenario planning, however, assumes that the future can differ greatly from what we know today.

The method is based on creating a series of 'different futures' generated from a combination of known factors, such as demographics, with plausible alternative political, economic, social, technical, legal and environmental (PESTLE) trends which are key driving forces. These futures can then be costed in a similar way to existing budgets.

Concluding points

As VCS organisations we need honest self-analyses of our organisations as commercial operations, and a renewed interest in the opportunities of partnership and social enterprise.

We need to undertake comprehensive market research with service users and staff and any research in relation to pricing and competitors is key; instead of telling people what we've got, we need to start by finding out what people want. Crucially we also need a professional marketing strategy AND a discrete marketing budget!

We need to reorganise our infrastructure and staffing, and sell the benefits to existing staff of operating in a personalised budget environment.

We cannot solely base our personalisation forecasts on last year's figures; we need to be proactive in reconfiguring and

calculating what we can do. We need to calculate the micro costs for individual users, perhaps with additional methodologies, but still cross-reference these to our overall total costs.

As ever we need to remember that the existence of surpluses, overheads and reserves are de facto good and are primary evidence of quality services and a sustainable organisation.

Personalisation in practice: what are organisations doing now?

Essentially the transition to personalisation is the same game as the transition to contracting, where information is control and power.

We particularly reference here DHCare Networks as an essential site:

<http://www.dhcarenetworks.org.uk>

Recommended reading includes “Contracting for Personalised Outcomes: Learning from Emerging Practice”.

<http://www.dhcarenetworks.org.uk/Personalisation/Topics/Browse/General/?parent=2734&child=6052>

MacIntyre

MacIntyre and The Opportunities Project are two organisations that have adopted personalisation thinking in their approach to services.

MacIntyre is an organisation with a long history promoting person-centred services developed jointly with service users. MacIntyre aspires to be a person-centred organisation and its organisational structure, style of management and approaches to its workforce as well as its services reflect its core values.

Staff must demonstrate an understanding of person-centred support in their initial recruitment and this understanding is continually developed and reinforced through ongoing training, supervision of individual workers and through feedback from people using the services. Its open culture and deliberately flat organisational structure enables MacIntyre to be responsive to individual needs and preferences.

www.macintyrecharity.org

The Opportunities Project

The Opportunities Project is based around two main services, the SEE ME service and the HEAR ME advocacy service. The service is aimed to help people participate and engage in daily living in their community and increase opportunities for independence, social and work activities.

Since it was established, The Opportunities Project has evolved to offer a wide range of individual support through services including help filling in forms, accessing primary health care by making and keeping appointments, help with household chores, accessing and taking part in social and leisure activities, and help with employment preparation.

opportunitiespro@btinternet.com

Navigating the social care market - shop4support

Shop4support is a web-based solution that aims to help service users, providers and commissioners navigate the social care market. It provides a one-stop shop for information and access to the support services and products available to the service users' needs.

Shop4support was pioneered by In Control to help service users make the transition from top-down approaches to service planning, towards designing their own solutions and making creative choices about their support.

Shop4support is a social enterprise owned by In Control, and was established with support from the Department of Health and substantial investment from Valueworks, who provide the infrastructure behind Shop4support.

In Control observed that service users had to gather information on available services to multiple sources in the process that was often confusing and time-consuming. Through Shop4support they aim to bring this information together in one place to make the social care market easier to navigate and so encourage and help service users to take more control over their support.

Services on the site range from traditional care services such as domestic help and personal care, to education, lifestyle and leisure activities, and products and equipment that help people live independently.

Through integrated vendor rating system users are able to access to assess the quality of services and providers are encouraged to list their accreditations and offer reviews and references where possible.

Budget holders can also choose to purchase services and products through the Shop4support online ordering system, which is designed to ease the administration and payment process the budget holders and assist with managing and tracking budget spending.

By automating the payment system Shop4support also aims to help providers in tracking and managing their transaction costs and reduce administrative efforts.

www.shop4support.com

Also see <http://www.sds4me.org.uk>

Lancashire support services (LSS)

LSS are a user-led organisation, modelled on the Centres for Independent Living, which works to empower disabled people to take control of their lives through direct payments, personal budgets and the Independent Living Fund. A small team of independent living advisers provide information, advice and support to local citizens, including assistance with staff recruitment, employer responsibilities, record-keeping systems, using agencies, fact sheets on self-directed support and access to a personal assistants register. LSS are also developing a county-wide network of groups dedicated to peer support for those directing their own care.

<http://www.lancshiresupportservices.info>

Oldham's commissioning strategy: working with providers

Oldham have been proactive in signalling their intentions and engaging providers in developing their new commissioning strategy (to be published shortly). The strategy includes projections of the numbers of people expected to have personal budgets over the next three years, data on the numbers who so far have changed their service arrangements and information about the things people have bought and would like to buy. The strategy clarifies the role of in-house provision, which is concentrated on specialist and very complex needs

work, and makes Oldham's risk enablement strategy available to all providers looking to change their businesses. It has been preceded by 'constant communication' through pre-existing and new forums so that providers have now had as many information sessions on individual budgets as internal staff.

Partners in Support and Hertfordshire County Council

Partners in Support was established in 2007 through partnership working with Hertfordshire county council. Partners in Support is a voluntary organisation providing an intensive support service to people with severe and complex learning difficulties.

By offering users a personalised service that is shaped around their particular support needs and aspirations, Partners in Support aims to enable users to live as independently as possible in homes and participate in their local community.

They drew up a business plan which set out the vision for the organisation, broke down support costs for each individual service user; project infrastructure and administration costs and explained how the personalised approach would work in practice.

Partners in Support has reduced the overall cost for users by reducing the need for further interventions and hospital admissions and has enabled Hertfordshire county council to make the best possible use of its resources.

www.partnersinsupport.org.uk

The National Brokerage Network

The National Brokerage Network aims to help develop policy and practice around brokerage and support the development of local brokerage services to its growing network of providers and regional coordinators.

The network acts as an information and knowledge exchange and offers guidance and representation to existing and potential progress organisations. It is also working to develop quality systems and standards for brokerage and develop best practice through a series of emerging training and accreditation schemes.

NCVO PSD Network

<http://www.ncvo-vol.org.uk/psdnetwork>

Other useful references

In Control - a social enterprise working across the sectors to transform social care system into one based on user-led self-directed support.

www.in-control.org.uk

Department of Health personalisation webpages.

www.dh.gov.uk/en/social_care/socialcarereform/personalisation

Social Care Institute of Excellence - developing and transforming knowledge about good practice in personalisation.

www.scie.org.uk/adults/personalisation

The IBSEN report - national evaluation of the individual budgets pilot project.

<http://php.york.ac.uk/inst/spru/research/summs/ibsen.php>



ACEVO is the professional body for third sector chief executives. We connect, develop, support and represent our members, to increase the sector's impact and efficiency.

We promote a modern, enterprising third sector, and call upon organisations to be:

- **Professional and passionate** in achieving change and delivering results
- **Well-led**, with a commitment to professional development, training and diversity
- **Well-governed and accountable**, with robust and fit-for purpose systems to protect independence and enable effective decision-making
- **Enterprising and innovative**, taking a businesslike approach to funding issues and striving for continuous improvement and sustainable development.

For more information, visit www.acevo.org.uk