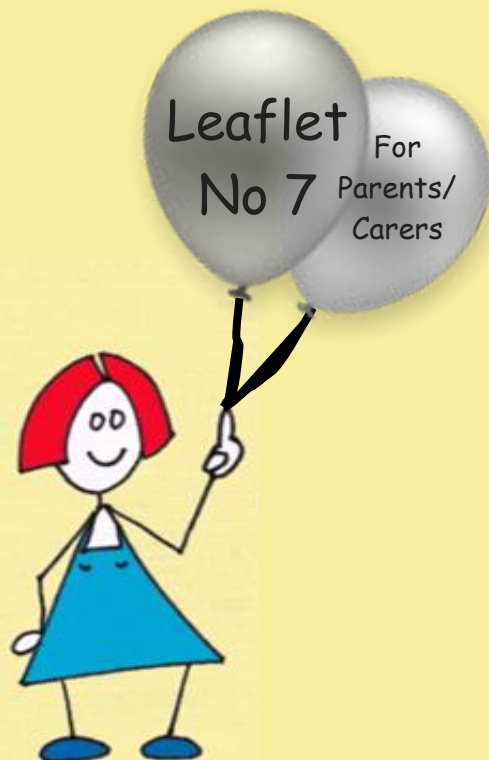


Personal Budgets And Direct Payments



This leaflet has been produced by the Bournemouth SEN Team

to provide a summary about

- Personal Budgets in general
- Direct Payments
- Personal Travel Budget

This leaflet is based on the Department of Education "Making It Personal" 62 page booklet which can be viewed at:

<http://www.kids.org.uk/publications>

Available from us on request

To apply for a Personal Budget please contact the SEN Team

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Building a Better Bournemouth

PERSONAL BUDGETS

As part of an Education, Health and Care (EHC) Plan, young people and parents/carers have a right to request a personal budget once the authority has completed an assessment and confirmed that it will prepare an EHC plan.

WHAT IS A PERSONAL BUDGET?

A personal budget is an amount of money identified by the local authority to deliver all or some of the provision set out in an EHC plan. It means that a parent or young person can control aspects of their support by having a say in how the budget is used. Funds are available to children and young people where it is clear that they need additional provision above that offered through local services.

WHO CAN REQUEST A PERSONAL BUDGET?

Young people and parents of children have a right to ask their local authority to prepare a personal budget once it has completed the assessment and

confirmed that it will prepare an EHC plan.

WHEN SHOULD A PERSONAL BUDGET BE DISCUSSED?

There should be early discussions about personal budgets with the parents or young person at the same time as they are given information about available options and they should also be made aware of how it might be relevant to their own particular circumstances. There should also be information about special education provision for which a **Direct Payment** may be available.

WHAT CAN BE INCLUDED IN A PERSONAL BUDGET?

It should reflect and cover all of the services in the EHC plan including education, health and care services.

WHAT SHOULD A PERSONAL BUDGET BE BASED UPON?

Personal budgets should be based on clear, agreed goals that are set out in the EHC plan.

HOW DOES A PERSONAL BUDGET WORK?

There are four ways parents and/or young people can choose to control their personal budget.

- **Direct payments.** This is when individuals are given the funds to contract, purchase and manage services themselves.
- **An organised arrangement.** The authority holds the funds and arranges the support specified in the EHC.
- **Third party arrangements/nominees.** Funds are paid to an individual or another organisation on behalf of the parent/carer or young person and they manage the funds.

WHAT IS THE SCOPE OF THE FUNDING?

A personal budget can include funding from education, health and social care. The scope of the budget will vary depending on individual needs and eligibility criteria. It will also reflect local circumstances and the type of school requested.

CAN I CHALLENGE THE AMOUNT OF A PERSONAL BUDGET OR THE REFUSAL TO PROVIDE ONE?

Families and young people can challenge the amount or a decision at the outset although it will not be possible to see if the funding is the right amount until all the details of the EHC provision have been considered.

DIRECT PAYMENTS

A direct payment is available to a child or young person who is disabled and has been assessed as needing children or adult services from the ages of 0-25. The cash payment is made to those with parental responsibility or directly to the young person so that they can arrange the exact services they need.

For education direct payments, local authorities have to consider the impact on other children, for example, whether they would still be getting value for money. They also have to get agreement from your child's school if you want to use a direct payment for a service that will be delivered at school.

CAN I DECIDE NOT TO ACCEPT DIRECT PAYMENTS?

Payments may only be made if the parent/carer or young person agrees and they opt to receive services provided by Bournemouth Borough Council.

WHO IS ELIGIBLE FOR A DIRECT PAYMENT?

Direct payments can only be offered to three groups

- Those with parental responsibility and caring role for a child who is disabled
- A young person who is disabled aged 16-25
- Young carers over the age of 16 (in exceptional circumstances).

Before a direct payment can be offered an assessment **must** be undertaken. The assessment will establish the needs of the child and family. Working Family Tax credit may be the better way to fund the use of an after-school childminder for families on a low income rather than direct payments.



HOW MUCH IS DIRECT PAYMENT?

The amount should be sufficient to purchase exactly the quantity and standard of service that has been decided in the assessment. It should help to increase choice and flexibility and should reflect current market rates for services.

WHO CAN I GET HELP WITH MANAGING DIRECT PAYMENTS?

Penderels Trust, a not-for-profit organization, has a wealth of experience to assist parents who would like help with direct payments. It offers support to families and young people with disabilities in Dorset.

Its services includes everything from the initial set up of the direct payments to helping with recruiting and managing a personal assistant. It also has independent advisers who will discuss any concerns parents or young people may have at the outset when deciding if a direct payment is right for them. Telephone: 08456 00289 e-mail: bdp@pendereltrust.org.uk

WHAT CAN YOU SPEND YOUR PERSONAL BUDGET ON?

It is important that you feel able to suggest ways to use your child's budget that are personal to him/her and your particular family circumstances, as long as it is meeting the agreed outcomes. These are just some examples:

- Support in your own home, whether it's equipment or help with personal and domestic activities.
- Equipment to help communication or learning.
- Support for your child to join in with local clubs or activities.
- Sports or cultural activities.
- Short breaks.
- Employing personal assistants.
- Someone to go with you on a daytrip or short break e.g. so you have more time for brothers and sisters.
- Work experience or work-based learning opportunity.

WHAT YOU CAN'T SPEND YOUR PERSONAL BUDGET ON

There are some things that you can't use your personal budget for, for example: vaccination or immunization, NHS health screening, NHS health checks, services that are provided by your GP, prescriptions, and dental charges.

As a general rule, you can't use a personal budget to employ a family member who lives with your child, but there may be exceptional circumstances where this will be agreed.

Even if a personal budget is not possible, if a flexible and 'can do' approach is taken by education, health and social care partners then really innovative arrangements can be made. As show in the following example:



Lucy is in Year 10 of a mainstream school, with targeted funding for support throughout the school day. When she and her family were choosing her options for GCSE at the end of Year 9, they wanted to help her pursue her love of music and support her real talent in composing. It was clear that a GCSE syllabus would not offer the best opportunity for Lucy to demonstrate her skills in music – she doesn't use as many words to speak and her writing skills are limited. The school knew that Lucy already had private keyboard lessons from David on a Saturday and suggested that his skills might be used in school.

After some careful planning, it was agreed that the school would use some of Lucy's targeted funding to pay for David to come into school for two hours a week to work with Lucy and her teaching assistant on a BTEC course, with the remaining hour of study being supported directly by school. This arrangement has been incredibly successful as most of Lucy's achievements are recorded through video and photographic evidence – at Christmas she gave a keyboard performance to the whole of the GCSE music group. She is about to move into Year 11 and she is set to get a level one qualification.



WHAT IS A PERSONAL TRAVEL BUDGET?

A Personal Travel Budget (PTB) is a sum of money paid to parents or carers of children with Special Education Needs and Disabilities (SEND) who are eligible for travel support assistance school travel. Having a PTB gives families the freedom to make their own decisions and arrangements about how their child will get to/from school each day.

WHO CAN GET A PERSONAL TRAVEL BUDGET?

You can apply for a PTB if your child lives in Bournemouth and is eligible for home to school travel assistance and attends a school, college or other educational setting. If you apply for a PTB, the Council will need to be satisfied that you have a suitable plan in place to get your child to/from school. Additionally, the Council will need to check that your child's attendance at school is acceptable (they are meeting the average attendance level for a child of their age group). A suitable plan is one that provides appropriate transport that allows your

child to get to school on time, safely and ready to learn. The Council reserves the right to decline applications if no suitable plan is in place or there is a risk that a child's attendance at school could be adversely affected.

WHAT ARE THE BENEFITS OF PERSONAL TRAVEL BUDGETS FOR FAMILIES?

- Freedom and flexibility to make travel arrangements that best meet their family's needs and circumstances.
- Choice and control over how funding to support their child's needs is spent.
- Opportunities to share with other parents and potentially increase buying power.

HOW MUCH WILL MY PERSONAL TRAVEL BUDGET BE?

The PTB will take account of where you live, what school your child attends and their travel needs. PTBs will be reviewed each year to take account of changing costs and any changes to

your child's travel needs.

WHAT SORT OF TRAVEL ARRANGEMENTS SHOULD I MAKE FOR MY CHILD?

You can make whatever travel arrangements you like as long as you meet your responsibilities under your contract with the Council. Your options include:

- Purchasing a travel pass for you and your child and using public transport
- Walking with them to school
- Cycling with them to school
- Drive them using your own vehicle
- Arrange shared travel arrangements with other parents, such as shared driving responsibilities, walking, buses, joint taxi bookings or a walking bus.

(A walking bus is when adults supervise a convoy of children, collecting them from their respective addresses on their journey to school.)

If you cannot do these things with/for your child, you could ask a family member, friend, someone else you trust, or, pay a carer to do it for you.

It is important that you ensure the arrangements you make for your child's travel are reliable. Your child's education will suffer if they are regularly late for school and schools do not have the facilities to look after children at the end of the day if you are late arriving to collect them.

HOW WILL THE PERSONAL TRAVEL BUDGET GET PAID?

Payments will be made from the council into your designated or usual bank account in three equal installments at the start of each term. You will need to provide us with your bank details when you sign the contract.

WILL I REGULARLY NEED TO SHOW THE COUNCIL HOW I AM SPENDING THE PERSONAL TRAVEL BUDGET?

No. We want to keep the flexibility and control with you, and we will therefore keep monitoring to a minimum. We will monitor your child's attendance and check to see that they arrive at school on time and are fit to learn.

WHAT HAPPENS IF I SIGN UP FOR A PERSONAL TRAVEL BUDGET AND THEN CAN'T GET MY CHILD TO SCHOOL?

PTBs are voluntary and if you find that you can't keep up the commitment, you will be able to leave the scheme at the end of term. You will need to give notice of at least 4 weeks. This allows sufficient time for alternative travel arrangements to be made by the Council. If you find you are having difficulties with your travel arrangements, we may be able to help you by providing advice or adjusting the amount of your PTB if your circumstances have changed. The Council is committed to making PTBs work.

IF I SIGN UP FOR A PERSONAL TRAVEL BUDGET CAN I LATER CANCEL MY CONTRACT WITH THE COUNCIL?

You will be able to withdraw from the scheme at the end of term, but you will have to give the Council 4 weeks notice so they have plenty of time to make alternative arrangements for your child.

CAN THE COUNCIL WITHDRAW MY PERSONAL TRAVEL BUDGET FOR ANY REASON??

The Council could cancel your PTB if:

- Your child's attendance is unacceptable and/or they are late for school.
- You move home and your child is no longer eligible for home to school travel support.
- You have not made safe travel arrangements for your child.
- Your child leaves the school.
- The scheme is discontinued.

WILL IT HAVE AN IMPACT ON OTHER BENEFITS?

No, PTBs do not affect any other benefits you might receive.

WILL THE PERSONAL TRAVEL BUDGET CONTINUE IN FUTURE YEARS?

As your child grows we would encourage them to travel independently. This will be discussed with you at annual reviews.