

Individual Service Funds - Dimensions

Introduction

In 2008 the senior managers in Dimensions were starting to ask the question, what does personal budgets and Individual Service Funds mean for us as an organisation? Dimensions is a not-for-profit organisation which began in 1975 and now supporting over 3,000 people with a learning disability or autism across England and Wales. They offer a range of support services to children and adults of all ages and their carers, including those with autism and complex needs. Like many providers, Dimensions support large numbers of people who live, in what can be described as traditional (shared) services (sometimes called residential care homes or group homes). The question they asked was how can they work in partnership with their commissioners to enable people to use Individual Service Funds to have choice and control over their life and service? Fundamental to this change was people knowing and controlling their budgets. From the outset Dimensions were clear that whilst having choice and control over money does not guarantee a better life for people using services, it is a fundamental starting point to make this happen.

Background information

As this would require fundamental changes to structure, culture and processes, Dimensions decided to start small and learn deeply before rolling out. They identified and asked six people who lived together, supported by an enthusiastic manager, to work together to learn from practice about what it would take to make this change. They worked with their local commissioner to get permission to explore this.

The process was to do an internal resource allocation, then plan using person-centred practices, create an agreement that summarised the allocation and outcomes, to implement this and then review it. Here is a summary of their early work and learning

<http://bit.ly/18Ry6da>

Resource allocation

Dimensions were seeking to apply three key principles of simplicity, transparency and reasonableness and identified three tests to be used within the funding allocation:

- Each person will pay an equal share of the 'core costs' and of any 'shared costs' they require.
- Each person will have choice and control over how their 'in my personal control funding' is spent, including the freedom to spend it with another provider.
- If a person were to leave the service, the budget (including staff) could be reduced immediately by the value of his/her discretionary funding.

Support Planning - Planning Live and Just Enough Sup

(<https://youtu.be/0Dnn8Xavjwk>). The next step is to see how this week can be delivered, within the allocation. "Just Enough Support" is a process to look at delivering the support the person requires within budget. Just Enough Support starts with family, friends, community,

and assistive technology and then considers paid staff as an option after that.

(<https://youtu.be/O21eI-V0z-A>), (<https://youtu.be/m2kEMedi3xA>)

Findings

Lessons from Dimensions

Doing an in-depth pilot enabled the organisation to fully appreciate that this was not a technical change, but a significant cultural change, in relation to the role and expectations of staff. One of the early challenges was developing an internal allocation process that the commissioner was also happy with.

Developing an allocation process

Their starting point was to develop a means of allocating the existing funding fairly and decided to trial two existing tools - the Care Funding Calculator and the Resource Allocation System tool from In Control. Their intention was to use the two methodologies and then determine the most appropriate tool to use. Unexpectedly the tools resulted in widely different allocations for everyone. Their review led them to conclude that these differences were most likely because each tool attempts to measure the same things, but from very different perspectives. They concluded that the Care Funding Calculator allocation gave a much better reflection of what support people needed

Planning Live and Just Enough Support

Planning Live meant that the planning could be person-centred, asset-based and efficient. Rather than many, many separate meetings, the process usually involves between four and six individuals and the people close to them, and takes place over two consecutive days. The individuals and the people they invite each have their own table and work together, but there several points of sharing and mutual support throughout the two days. 'Just Enough Support' is another asset-based approach enabled the team to look at assistive technology and community supports, to deliver how people wanted to live, within their allocation. This resulted in a fundamental shift in how support was provided.

Person-centred reviews

They learnt that the person-centred review is not the end of the process, rather it is the point that the cycle starts again. The person-centred review is a way to look at what is working and not working, and therefore to discover:

- Does anything need to change about the allocation?
- What needs to change or be updated in the support plan? What are the person's outcomes for the following year?
- What would therefore need to change or be updated in the person's 'perfect week'?
- How can we deliver these changes with the person - using 'just enough support'?
- How can we implement this? Who needs to do what?

Using person-centred reviews also enabled the organisation to use Working Together for Change to inform strategic business planning <https://youtu.be/Xo3KxJNVG0M>

Delivering ISFs at scale

To date over 950 people have an ISF in Dimensions. They made personalisation an organisational priority, and developed a far reaching strategy that not only stretched into the day-to-day work of support teams, but also included the systems and processes of the supporting departments and structures. Importantly, this was not just a change of process or structure, but one of culture and behaviour as they realised the organisations 'personality' or 'character' needed to be consistent throughout to succeed

They aimed to create a feeling of excitement and anticipation ('a buzz') across the organisation alongside the important features of any successful project, such as developing success criteria, measures, baseline data, timescales and responsibilities. Dimensions invested heavily in a core project team (including those that could act as sounding-boards and critical friends from outside Dimensions) and developed a comprehensive guide for those taking on this journey locally. Workshops, quizzes, posters, films and regular e-briefings all added to some very wide reaching internal communication.

All staff were trained in the person-centred thinking skills and tools through e-learning, and investing in Performance Coaches as local accredited 'experts' in person-centred practices. Dimensions took a 'base line' of where managers were starting from, by using Progress for Providers for managers <http://bit.ly/1bSjfDZ> and then used this to set individual goals and to inform workforce development.

Solution

The proposed minimum process for delivering ISFs at scale in partnership with commissioners is:

1. Build manager and staff competence in using person-centred practices through understanding where you are now (Progress for Providers for managers), investing in e-learning, and supporting managers to see their role as coaching staff to embed these in their day to day practice (<http://www.helensandersonassociates.co.uk/8-ways-use-team-meetings-increase-teams-competence-person-centred-thinking-tools/> <http://bit.ly/1EULyPa>)
2. Work with commissioners to identify how to do an indicative allocation for each individual, and for each person be clear what is in their personal control
3. Use person-centred practices to identify outcomes, as well as how people want to live (eg perfect week <https://youtu.be/5MvabpM32KM>) and to enable people to choose who supports them.
4. Build the rota/roster/schedule around how people want to live, supported by who they choose, within budget
5. Use person-centred reviews as the engine of change, and as the organisations accountability back to the person.
6. Invest in managers and internal 'experts' ('Performance Coaches' in Dimensions)
7. Invest in a robust comms plan to ensure everyone understands what this will mean for them, including back office functions.
8. Work closely with families (Dimensions employs two family members to try to ensure that they are family friendly) and people who use the service (Dimensions have a Speak Up and Make a Difference group) to make sure stay true to best practice principles.

The detailed story of this work is can be found in Making it Personal for Everyone – from block contracts towards Individual Service Funds by Steve Scown and Helen Sanderson Available as a free download on <http://bit.ly/18Ry6da> The Individual Service Fund Handbook (2015) by Helen Sanderson and Robin Miller, JKP, London <http://bit.ly/1IJ81QT>