

Allocation / Assessment of Personal Assistance

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Introduction

This paper was prepared following a meeting and discussion with Elena Pecaric and Klaudija Poropat at YHD, Ljubljana in October 2017. It is based upon many years of experience of thinking about how to develop simple and easy to use approaches to allocating resources; in this case personal assistance.

Foundation

There are two key values that must underpin any allocation system. Without these the exercise risks losing meaning and usefulness.

Simple – everyone is able to participate

- Risk: If complicated then both the worker completing the form and the person whose support is being discussed will struggle to understand how decisions are being made and how the end result applies to them.

Transparent – everyone understands the decision-making process

- Risk: If its not transparent then people will question how decision and who is making decisions about their support. Keeping the process transparent supports good discussion and can reduce conflict and disagreement.

What is a fair allocation of personal assistance?

This is the key question. Any approach will need to be tested against the support currently received by people through Personal Assistance and as it is introduced the approach will need to be revised as greater knowledge of how it works and how accurate it is becomes clear.

Consistency:

Ensuring the same decision-making process is used for everyone who may need personal assistance.

- A consistent set of questions – a decision on the number of hours a person needs should be based on the same set of questions used for everyone requiring personal assistance.
- A consistent set of outcomes – the outcomes will be consistent and provide a set of statements that equate to key parts of living

independently.

- A consistent support to complete (training and supervision) – training will be needed to ensure that everyone using the questions to assess personal assistance for people.

Outcomes and support

The overall outcome of the assessment/allocation process will be:

I have the personal assistance I need to independently and be included in my community

These are a first attempt at setting out 10 simple outcomes that cover parts of people's lives where they may need support to live independently. They will need to be discussed with people with different support needs and people of different ages.

- To make choices about what I eat, drink, wear and do during my day
- To communicate clearly and make my wishes and needs clear to the people who support me
- To get up, wash and be dressed ready to go out
- To manage my budget, make sure I have enough to pay my bills and buy my food
- To prepare my meals and have a healthy diet
- To get out and about in my local community and use public transport
- To meet with friends, enjoy leisure time and take part in my favourite activities
- To feel safe when i am out and about and taking part in community life
- To maintain my health and well being, and be as fit and healthy as I can be
- To have a good nights sleep

Working out how much support someone might need:

- Each statement covers part of 'living independently'.
- They are written very generally to apply across a whole diverse group of people.
- Each statement has four levels of support. The person

completing the questions should note which level best applies to the individual.

- When complete the questionnaire will support a decision being made about the number of hours support a person might need to 'live independently'.

IMPORTANT: This is only a suggestion and a first version. It is fully expected that this will change as people are consulted and as work starts to build evidence about the number of hours people need.

As development work starts and continues attention should be paid to:

- Keeping the approach simple and easy to understand and always working to keep the minimum amount of work needed to complete the assessment.
- Making sure all the language and decision making is accessible, i.e. simple words and that all decisions made involve the person and are not taken without them being present.

Using the assessment / allocation questions

1. The questions are completed by a worker with the person and those representing them in one interview.
2. The worker reads out the statement and they have a discussion about which level of support best represents what is needed by the person.
3. The worker records the decision.
4. At the end of each question is a space for any notes to be added about important things which have been discussed and which have influenced the decision.
5. The worker then puts all the results together and identifies what level of support is suggested overall and then in agreement with the person and the workers manager agrees how many hours will be provided.

It is important to note there is space for a level of discretion by the worker. The results do not work out a specific number just a band of support. During the discussion it may be clear that the person may need some expert support / professional support. This can be

noted in the 'Notes' section as it might need to be recognized in the number of hours made available or in additional expertise offered to the person.

Setting a number of hours:

Each statement offers the worker a chance to record a specific level of support.

Level of support		Number of hours
Minimum		Up to 4
Some		Up to 8
Lots		Up to 16
Maximum		Up to 24

When all 10 statements are complete then the worker can record the 10 results and in discussion with the person and those representing them make a judgment on which over all level best represents how much support a person will need

Recording the decision

Record the number of times a level of support was agreed upon in the following table.

Agreement of level of support				
Making choices				
Communication				
Personal Care				
Money				
Food and eating				
Out and about				
Friends and activity				
Being safe				
Being healthy				
Sleep				
Decision				

Statements:

1. Making choices

To make choices about what I eat, drink, wear and do during my day

Minimum

Some

Lots

Maximum

Notes:

Note: Everyone can make choices. People may need to know someone well to know what choice they are making. This is linked to the next question communication.

2. Communication

To communicate clearly and make my wishes and needs clear to the people who support me

Minimum

Some

Lots

Maximum

Notes:

Note: To communicate clearly some people might need skilled support

3. Personal care

To get up, wash and be dressed ready to go out

Minimum

Some

Lots

Maximum

Notes:

4. Money

To manage my budget, make sure I have enough to pay my bills and buy my food

Minimum

Some

Lots

Maximum

Notes:

5. Food and eating

To prepare my meals and have a healthy diet

Minimum

Some

Lots

Maximum

Notes:

6. Out and about			
To get out and about in my local community and use public transport			
Minimum	Some	Lots	Maximum
Notes:			

7. Friends and activity			
To meet with friends, enjoy leisure time and take part in my favourite activities			
Minimum	Some	Lots	Maximum
Notes:			

8. Being safe			
To feel safe when I am at home or out and about and taking part in community life			
Minimum	Some	Lots	Maximum
Notes:			

Note: Being safe is really important, someone might need a lot of support to be safe.

9. Being healthy			
To maintain my health and well being, and be as fit and healthy as I can be			
Minimum	Some	Lots	Maximum
Notes:			

Note: This includes good mental health and well being.

10. Sleep			
To have a good nights sleep			
Minimum	Some	Lots	Maximum
Notes:			

References:

Understanding the Resource Allocation System

http://www.in-control.org.uk/media/131598/understanding_the_ras%20-%20final%20for%20print.pdf

Upfront: The benefits of knowing your allocation upfront

<http://in-controlscotland.org/wp-content/uploads/2016/01/ICS-Benefits-Upfront-Resource-Allocation-ISBN-Updated-January-2016.pdf>