



**Introducing Personalised  
Budgets for People with a  
Disability in Ireland:  
Have Your Say**

Consultation for the Task Force on  
Personalised Budgets

October 2017

## **Section 1: Your Opinion Matters**

This public consultation is being carried out to help the Department of Health to develop plans for the introduction of a system of personalised budgets in Ireland

We would like to find out what people think about personalised budgets and how they should be used in Ireland. We would also like to hear the public's view on what supports people with a disability might need to help them in using a personalised budget. These views will be incorporated in the Task Force report and an appendix will set out the findings of the consultation.

The Task Force will use the findings of the consultation to help them to make recommendations on a personalised budgets model to the Minister for Disabilities, Finian McGrath, by the end of 2017.

This stage of the consultation is particularly aimed at people who may wish to use personalised budgets, their families and the general public. However, everyone with an interest is welcome to participate, including: health and social care providers; health and social care workers; advocacy groups; those providing complementary services (such as existing providers of forms of personalised budgets); and representative organisations.

It is important to say that this consultation paper is just part of a broader consultation process on personalised budgets. The Department is also working to consult by meeting with individuals and groups so they can tell us directly what they think.

## Easy read

A shorter, “easy read” version of this consultation paper is also available on the Department’s website. If you would like to receive a paper version of the easy read consultation paper, please contact the Department at the phone number, email address or postal address below.

## How to take part

You can find the consultation questions at <http://health.gov.ie/consultations/> and return them by email to [Budgets\\_Taskforce@health.gov.ie](mailto:Budgets_Taskforce@health.gov.ie).

If you prefer, you can download a copy of this document at <http://health.gov.ie/consultations/> and post it to us at:

Personalised Budgets Consultation  
Room 3.16  
Department of Health  
Hawkins House  
Hawkins Street  
Dublin 2, D02 VW90

Alternatively, if you would like a paper copy to be sent to you, please contact the Department of Health using the contact details written above or by calling (01) 6354769.

You can also contact the Department at this phone number or at our email address ([Budgets\\_Taskforce@health.gov.ie](mailto:Budgets_Taskforce@health.gov.ie)) if you have any questions about this document.

## Closing date

The closing date for submitting your views is **Friday, 20 October 2017**.

The Department would like to acknowledge the assistance of the National Disability Authority in drafting this consultation paper.

## **Data Protection and Privacy Provisions**

The information shared by you in this consultation will be used solely for the purposes of policy development and handled in accordance with data protection legislation. An analysis of submissions received as part of the public consultation will be published online which will include a list of organisations and representative bodies that responded. Comments submitted by individuals may be used in the final consultation report but these will be anonymised. All personal data is securely stored and subject to data protection laws and policies. For more information, see <http://health.gov.ie/data-protection/>.

Please note that submissions received by the Department are subject to the Freedom of Information (FOI) Act 2014 and may be released in response to an FOI request.

People making submissions may be lobbying under the terms of the Regulation of Lobbying Act 2015. You can use this [website](#) to check if your submission is considered to be lobbying.

## Section 2: Role of the Task Force on Personalised Budgets

**Note:** Before you begin to answer the questions, you might find it helpful to read this section which has information about the introduction of personalised budgets in Ireland and the consultation process. An Easy Read version of this information is available from the Department of Health's website at: <http://health.gov.ie/consultations/>.

### Key Point

Throughout this consultation paper, guiding principles, important points to note or known factors in designing a Personalised Budget System for people with disabilities will be highlighted in these boxes.

The Task Force was established by the Minister of State for Disabilities, Finian McGrath T.D. on 20 September 2016, on foot of a commitment in the Programme for Government.

The Programme for Government contained a commitment to the introduction of personalised budgets for people with disabilities. Offering people the choice of a Personalised Budget is becoming increasingly common internationally as a way of providing people with more choice and control over the services and supports they access.

The Task Force on Personalised Budgets consists of a Strategy Group and an Advisory & Consultative Group. Its remit is to make recommendations on a personalised budgets model which will give people with disabilities more control in accessing health funded personal social services, giving them greater independence and choice in accessing services which best meet their individual needs. A Reference Group comprising people with lived experience of disability and disability services has also been established, and the views of this group will also feed in to the consultation process.

While the concept of personalised budgets is not limited to health and personal social services, the Task Force is focussing on personalised budgets for services for adults with disabilities funded by the HSE Disability Services in the first instance.

## **Section 3: What is a Personalised Budget?**

### **3.1 What is a personalised budget?**

Generally speaking, a Personalised Budget is a sum of money which is allocated to an individual by a State Body so that the individual can make their own arrangements to meet specified needs, instead of having their needs met directly for them by the State.

By availing of a personalised budget the individual has greater choice and control over the way in which their needs are met, compared with direct service provision.

In the case of the Task Force on Personalised Budgets, a personalised budget is a sum of money which would be funded from the HSE's budget for disability services and provided to an eligible person to meet their needs for personal social services and supports.

With a personalised budget, the person with a disability would use their budget to make their own arrangements to obtain the supports or services of their choice, instead of having those services provided for them directly by the HSE or a HSE-funded agency.

### Key Point

A guiding principle for the Task Force is that a person in receipt of a personalised budget should not be entitled to any more supports and services than would be available to a person who chooses not to use a personalised budget. This is not intended to stop people from finding ways to use their personalized budget in the best way for them.

### **3.2 Who will be able to apply for a Personalised Budget?**

People with disabilities who are eligible for HSE-funded disability supports and services will be able to apply for personalised budgets in the first instance. However, it should be noted that not all services and supports currently provided by the HSE will be funded by a personalised budget in the early stages of the programme. This is explained further under the next question.

It should also be noted that people who want to continue to receive traditional services from the HSE or a HSE funded service provider will not be required to apply for a personalised budget if they do not want to.

### **3.3 Why could some HSE funded disability services not be eligible?**

Funding for disability services has traditionally been provided in a block grant to a service provider based on the total number of people using the service rather than the actual cost of each person. Switching to personalised budgets means that the cost of the service to an individual would need to be calculated and separated or “unbundled” from the overall grant paid to their current service provider. This can be very complicated for the organisation and not all services provided by the HSE may be able to be “unbundled” in the short term.

However, "unbundling" will be the responsibility of the HSE and the service provider and is not something that a person applying for a personalised budget will need to be involved in at all.

### **3.4 What can a personalised budget be spent on?**

This is an issue that the Task Force has examined in some detail and the consultation process will help in forming the final list of what a personalised budget can be used for in the first phase of the roll out of Personalised Budgets.

It is expected that the 'basket of goods' available for people to use their personalised budget on may change over time. International experience has shown that, whatever the initial design of a personalised budget is, no model has gone without amendment and changes are made as issues arise.

The 'basket of goods' currently funded by HSE Disability Services are outlined in Section 4.

#### **Key Point**

**The Task Force is limited to providing recommendations on how a personalised budget could apply to supports for adults currently funded under HSE Disability Services. It is not within its remit to provide recommendations on supports provided by other Government Departments or agencies.**

### **3.5 What is not covered by a personalised budget?**

Just as in other aspects of personalised budgets, international experience has been varied, but every country has put in place some guidelines around what personalised budgets can be spent on.

Although the scope of the recommendation on personalised budgets has yet to be determined, there are some types of expenditure which will definitely not be included. These exclusions are common to personalised budget systems in other countries too.

These include:

- Things not related to the disability or that will not meet supported person's needs
- Day to day living costs
- Duplicates of other supports / services provided by other Government Departments or agencies
- Anything illegal or causing harm or risk to others

### **3.6 What supports will be provided to help use a Personalised Budget?**

The Task Force will be considering what supports will be helpful for persons with disabilities to apply for and administer personalised budgets. Some people may choose to administer their personal budgets by themselves, but others may need more help. Some of the things people may need to do when administering a personalised budget may include; hiring and managing employees; managing a bank account; keeping track of receipts; and taking on accountability for the funding.

For example, the Task Force will need to consider what information would be helpful and who could provide the support and guidance that a person using a personalised budget would like or need. A broker is someone who could provide people with the information, support and guidance they need to plan, arrange for and manage their personal budget to purchase supports and services.

## Section 4: Disability Services funded by HSE

Before you consider how you think a personalised budget could be used, it is helpful to first look at how services and supports currently operate. This section sets out a summary of the main HSE funded disability services and supports that people with disabilities currently avail of in the area of personal social services, and which are therefore relevant to the focus of the Task Force in the first instance. It does not therefore cover the areas of support currently funded by other Government Departments and agencies as they would continue to fund those areas e.g. training, education, employment supports, housing supports etc.

### Key Point

**It is important to note that not all services and supports funded by HSE Disability Services will be able to be 'unbundled' or reconfigured in the early phases of the rollout of a Personalised Budget System.**

#### **4.1 Adult Day Services / New Directions**

The HSE's New Directions policy for adult day services sets out a vision for supports for adults with disabilities to be delivered in the community, rather than, in segregated settings and to be based on individual's preference, rather than, pre-defined group activities.

New Directions sets out twelve supports that should be available to adults with disabilities using day services. It proposes that these services should take the form of individualised outcome focussed supports to allow adults using the service to live a life of their choosing in accordance with their own wishes and needs. These supports are under-pinned by the principles of person centeredness, community inclusion, active citizenship and quality:

1. Support for making choices and plans.

2. Support for making transitions and progression.
3. Support for inclusion in one's local community.
4. Support for accessing education and formal learning.
5. Support for maximising independence.
6. Support for personal and social development.
7. Support for health and wellbeing.
8. Support for accessing bridging programmes to vocational training.
9. Support for accessing vocational training and work opportunities.
10. Support for personal expression and creativity.
11. Support for having meaningful social roles.
12. Support for influencing service policy and practice.

Individualised supports are provided on the basis of a person-centred planning process and assessed need. In recent years, efforts have been made to standardise resource allocation for school leavers by implementing a standardised assessment and resource allocation process.

The Health Service Executive expect to provide or fund New Directions for 18,672 people in 2017, including 1,500 school leavers and those graduating from Rehabilitative Training.

The level of support provided to individuals varies in accordance with their assessed support needs.

## **4.2 Personal Assistance service**

A Personal Assistant or PA is employed by an individual or agency to support the person with a disability to enable them to live an independent life. Typically, the person with a disability has a degree of control over things like recruitment and training of Personal Assistants. The PA provides assistance, at the discretion and direction of the person with the disability, thus promoting choice and control for the person with the disability to live independently<sup>1</sup>. The Health Service Executive, which funds PA services expects to deliver 1.4 million PA hours to 2,280 people in 2017<sup>2</sup>.

Support is provided on a one-to-one basis. Typically, the person with a disability has a number of hours of PA support per week, which has been agreed with the service provider delivering the PA support.

PA allocations are typically made by an allocation of hours based on an assessment of need.

## **4.3 Home Support**

Home Support provides personal and/or essential domestic care and support to facilitate participation in social / leisure activities. This service is provided by the HSE or by providers funded by the HSE. Home Support is often provided outside of normal day service hours. Support is typically provided on a one to one basis. Typically, the person with a disability has a number of Home Support hours per week which has been agreed with the HSE / service provider providing the Home Support hours.

Home Support allocations are, typically, made by an allocation of hours based on an assessment of need.

The following Home Support is funded by HSE Disability Services:

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<sup>1</sup> HSE, 2015, Social Care - Disability Services Metadata 2015

<sup>2</sup> HSE, 2016, National Service Plan 2017.

<https://www.hse.ie/eng/services/publications/serviceplans/Service-Plan-2017/2017-National-Service-Plan.pdf>

**Home Care Assistant Service:** "a personal care service which provides personal support including washing, dressing and other activities of daily living and facilitation in social and recreational activities".

**Home Support:** Home Support Assistance is provided to the family in terms of assisting with care, facilitating attendance at social activities. Assistance is often provided outside of normal day service hours.

The HSE expects to provide 2.75 million home support hours to 7,450 people in 2017.

#### **4.4 Residential services for adults with disabilities**

The HSE currently has provision for 8,371 residential placements in its Service Plan 2017, of which 2,583 are in congregated settings.

Service providers are obliged to provide services and supports that

- Have the individual person at the centre of what they do in providing individualised services and supports
- Deliver best outcomes and a good quality of life for the person with a disability
- Provide safe services and promote the person's welfare
- Identify and promote optimum health and development for the person with a disability

Support is provided on a one to one basis and involves a process of transition planning with the individual, identifying the supports they need to make the transition and to help them to live independently and be part of their community.

The Programme for Partnership Government contains a commitment to continue to move people with disabilities out of congregated settings, to enable them to live independently and to be included in the community. The objective is to reduce this figure by one-third by 2021 and ultimately, to eliminate all congregated settings.

#### **4.5 Respite service**

Respite is defined in the Transforming Lives Value for Money and Policy Review of Disability Services as a support which “allows families/carers to have a break from caring responsibilities and may reduce reliance on more expensive alternative care.” The HSE has committed to providing 182,000 sessions of overnight respite and 41,000 day respite sessions in 2017.

#### **4.6 Other relevant HSE services: Rehabilitative Training Programme**

Rehabilitative Training focuses on the development of an individual’s skills, with a view to enhancing their capacity to live independently. Places are allocated by the HSE Occupational Guidance Service / HSE Social Care at Community Health Office level, following an assessment. Rehabilitative Training is centre-based training, focused on the development of an individual's life skills, social skills and basic work skills, with the objective of enhancing the trainee's quality of life and general work capacity and to progress to greater levels of independence and integration in the community.

Trainees, in Rehabilitative Training retain their social welfare payments, usually Disability Allowance, and receive a Rehabilitation Training Allowance of €31.80 a week.

The Health Service Executive expect to provide or fund Rehabilitation Training for 2,870 people in 2017.

## **Next Steps for the Task Force**

The Task Force agreed a work plan setting out seven work streams - Review of National and International Evidence; Eligibility & Resource Allocation; Financial Sustainability; Supports to Apply for and Administer Budgets; Governance & Accountability; Appraisal; and Implementation. Significant progress has been made in relation to these.

The responses from the consultation will be analysed by the National Disability Authority and the outputs, along with those from the work streams will inform the recommendations of the Task Force to the Minister.

It is anticipated that the Task Force will not present just one single model of a personalised budget to the Minister. It is expected that multiple models, with varying levels of oversight and governance, will be presented to the Minister.

## **Personalised Budgets Consultation Questions**

The consultation questions can be found in a separate Word document on the Department of Health website at <http://health.gov.ie/consultations/>.

Please email your submissions to [Budgets\\_Taskforce@health.gov.ie](mailto:Budgets_Taskforce@health.gov.ie) by 20 October 2017.

Thank you for your input.