

## Self-Directed Support – Services perspective

text by Sirkka Rousu

The implementation of the Self-Directed Support or Personal Budgeting (PB) model changes **the service user's** position and role in actively bringing forward their own needs and hopes and in finding the support and services that are best suited for them – even through experimentation with various options and new support ideas.

The service user's responsibility increases as their right of self-determination and freedom of choice are reinforced. Changes in the person's role and position are also naturally reflected in the role of the person's **designated social worker** and the relationship between the service user and the employee.

The relationship does not exist in a vacuum but is instead realized within **the organization** that serves the service user and employs the employee, and in the service and support environment where various forms of support, communal resources, and services are available (or not) to a varying degree. However, in the service system, the service user and the designated social worker have not had the power to make choices regarding support and services beyond the framework decided upon in organizations by prominent officials and policymakers.

**The idea of the PB model** is to reinforce an approach where the ultimate decision lies with the service user, who is supported by a designated social worker in planning and using the support mechanisms and services.

After all, our legislation provides the right of self-determination to us all. If this is genuinely made possible in an organization, the service user can also find non-traditional methods for promoting their wellbeing and everyday ability to function, which still produce the result sought after with the person; wellbeing, functional ability, and reinforced coping in daily life. While it may be quite challenging to convert the needs of the person and the objectives specified for the support into money, i.e., an individual budget, it would be advisable to also make it possible for the person to use and try out completely new forms of support and sources of wellbeing. These new options could also be found in the domains of exercise or culture and various communal resources. In other words, solutions could also be found outside of a restricted range of social welfare and healthcare services.

**What actions are required in an organization** to allow for the application of the human-oriented Personal Budgeting model for the service users, employees, service providers, and communities?

- At the very least, each party requires more **information and training** on the idea behind the PB model and what the human-oriented approach means from the perspectives of the service user, employee, and service provider, as well as how the PB model can be applied.
- Are changes necessary regarding **the decision-making power of employees**? What type of internal PB consultation and discussion support will the employees need and how can they be organized into a PB team, for example?
- What about **the service user**; how should their choices and decisions be supported? Does the person need a **support person** in addition to a designated social worker and where can they find one?

- **Where** can the person find support and services that are best suited for them?
- **Which services** are already available and what new ideas could be tried?
- The service user and the employee should also be able to monitor the use of the agreed upon budget, preferably in real time. How can the person **monitor their budget** and is support for the management of a budget available somewhere?
- The model also comprises **service design on the individual or even family level** for the specific needs and objectives of the person and their family.

The human oriented PB approach is based on basic values, application policies, principles, and objectives **approved within the organization** and the monitoring of the effectiveness and impact of the PB model, where the experience of wellbeing and daily ability to function are used as key indicators. Development cooperation with various service providers and organizations will also be necessary.

**In person-centred work, the implementation of the PB model requires** open-mindedness, willingness to break down barriers, courage, and creativity, which are new elements that differ from the traditional and established approach. This means that the employees require training that can bring about changes of attitude, provide the abilities required for various encounters, and increase knowledge and understanding.

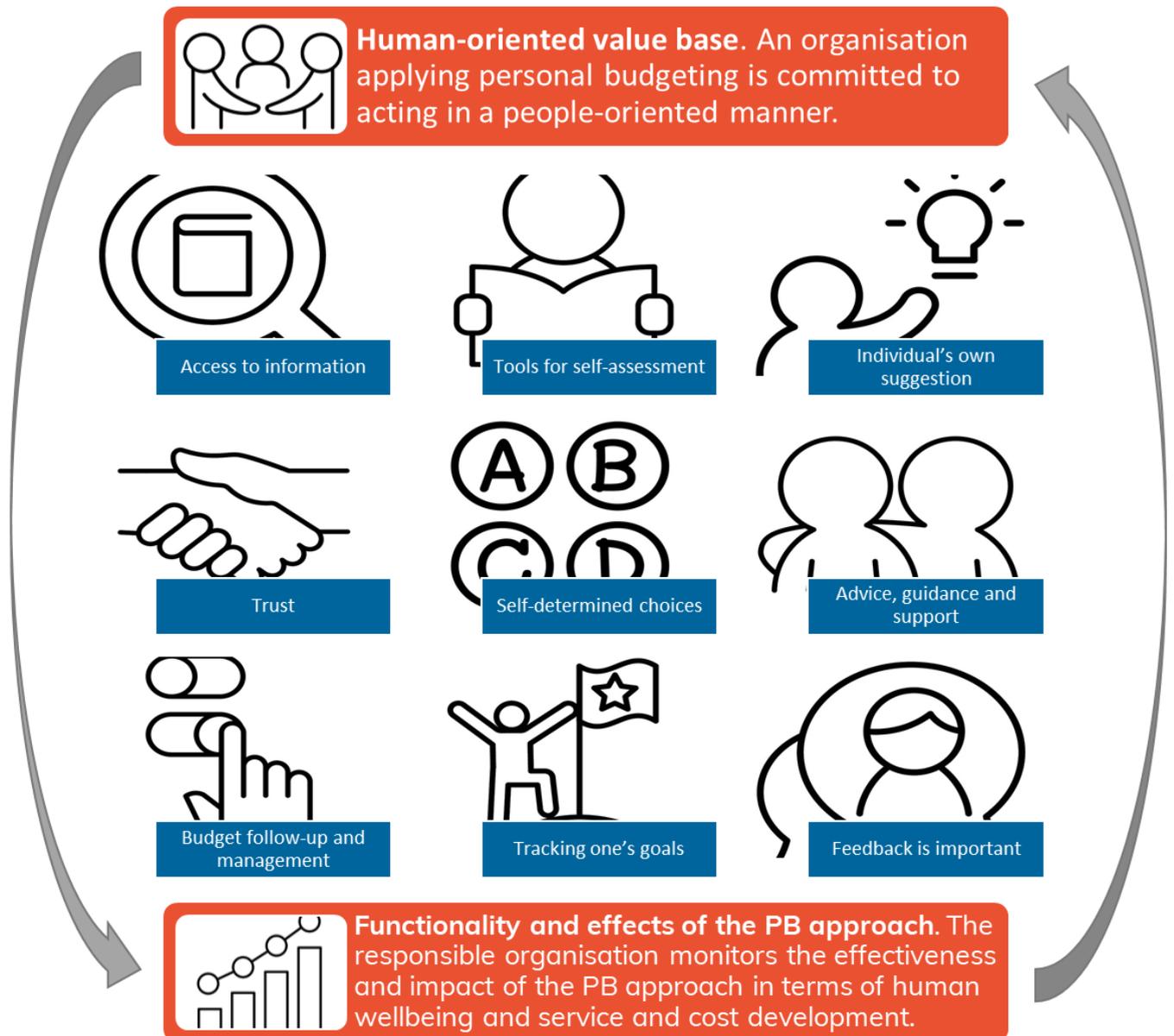
Where successful, Personal Budgeting empowers both the service user and the employee. In addition to the things mentioned above, it requires commitment and close cooperation with the person from the employee, while reducing unnecessary bureaucracy. Thus, structures and information systems should be sufficiently flexible to allow for the implementation of the new approach.

While the term person-oriented is used widely, with Personal Budgeting we could perhaps talk about an individualistic approach and person-centered planning together with the person. Person-centered planning enables the inclusion of the person in the specific matters that are important to them. From the employee's perspective, it is both a mindset and an approach. As Helen Sanderson has wisely put it: *"Only a small percentage of people need to know how to write good person-centered plans, but everyone involved needs to have good skills in person-centered thinking; in the value-based skills that underlie the planning."*

## Characteristic element of the personal budgeting approach

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With characteristic element of the personal budgeting approach, it is possible for the responsible organisation to assess their current strengths and development areas.



### **Human-oriented value base**

An organisation applying personal budgeting is committed to acting in a people-oriented manner. It promotes the person's self-determination, autonomy, participation, and self-use of the budget, and provides counseling, guidance, and other support to different service users, e.g. through support broker activities. Person-centred work is organised in a way which meets people's needs in a holistic manner without a rush, and takes factors such as family needs into consideration.

### **Access to information**

Municipality inhabitants and service users have access to information about the personal budget and its effects on their personal situation. They have sufficient information on the variety, quality and pricing of available social and health care services. Furthermore, they have access to information about activities promoting individual wellbeing and everyday functioning. Finally, they are made aware of the effects of different support activities based on the person's personal wishes and needs.

### **Tools for self-assessment**

Municipality inhabitants and service users have access to tools that help them reflect on their own needs, life situation and personal goals. They are made aware of self-assessment tools and methods for people of different ages and life situations. They have access to these tools both electronically and through other means.

### **Individual's own suggestion**

A personal budget is driven by individual needs and objectives and is based on the person's own suggestion. The structure of the budget is based on individual requirements about the appropriate services, activities promoting well-being, or both. The parties are able to calculate the budget sum when they have mapped these requirements, defined the appropriate services for achieving them, and determined their cost. The budget must cover all required day-to-day service and support that meets and agreed objectives. Furthermore, where appropriate, these service and support measures should extend beyond organisational and service sector boundaries. The ultimate goal is to support a person's good life.

### **Trust**

A personal budgeting organisation trusts its service users – both as a person applying for the budget and as its enduser. Additionally, the organisation trusts that the person, their close family and designated social worker have carefully considered and justified the service needs and that they have carefully considered the corresponding means and the goals agreed upon in order to enable good decisions on the budget and its implementation. An employee provides the organisation with his or her academic and practical knowledge of what kind of service or support has proven to be effective. As agreed by the organisation, the employee can, if necessary, consult the client team and superiors. The organisation supports the use of individual judgment and decision by i.e. training, consultation and PB implementation guidelines.

### **Self-determined choices**

The service user is able to use their personal budget in a self-determined manner. He or she can freely use the budget within the budgeting conditions specified in the support plan together with the designated social worker. Any limitations are determined in the support plan, support decision, or both – with the right of appeal included. There is a general restriction for all budget

users: The budget cannot be used for criminal activity or gambling. Technological tools are employed to support the use of the budget and its up-to-date follow-up.

### **Advice, guidance and support**

The user of a personal budget user gets to agree on the support he or she will receive from their designated social worker and possible support broker, including their role and tasks. Any person proposed by the service user, including a relative or another close person, may act as a support broker. Based on the person's needs, support will be available at all stages of the PB service user relationship.

### **Budget follow-up and management**

The budget user and their designated social worker can keep track of the budget implementation in ways determined by the organisation. The person reports the use of their budget as agreed upon. In the case of invoices, the service user confirms their accuracy. This way, the person can truly be in charge of their budget.

### **Tracking one's goals**

A person using a personal budget will agree on monitoring and evaluating their goals, such as how his or her needs and goals have been met within the agreed budget, or what impact the selected services and other support activities have had on their well-being. A joint assessment of the support plan and the according budget will take place at regular intervals.

### **Feedback is important**

A service user with a personal budget and their potential support person will provide feedback on their experiences and fulfilment of goals. In addition, employees of the organisation will use anonymous feedback to develop activities. Giving and receiving feedback, as well as knowing that this feedback is used, is relevant to all parties in the co-operation. Service users can participate in development activities in ways that best suit their advancement.

### **Functionality and effects of the PB approach**

The responsible organisation monitors the effectiveness and impact of the PB approach in terms of human wellbeing and service and cost development.