

# SDS, DPs & Supporting PA Employers

# Creating a smooth and empowering experience for service users



Who We  
Are

● centre for  
independent ● ● ● ●  
living ● ● ● ●  
n.i. ● ● ● ●



# Our Mission

**To empower disabled people to live  
independently in an inclusive society  
through delivering quality services and  
campaigning for change**

# Our Services

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ADVICE &  
SUPPORT



BUDGETING



ADVOCACY



PAYROLL

# Our Aims For Today

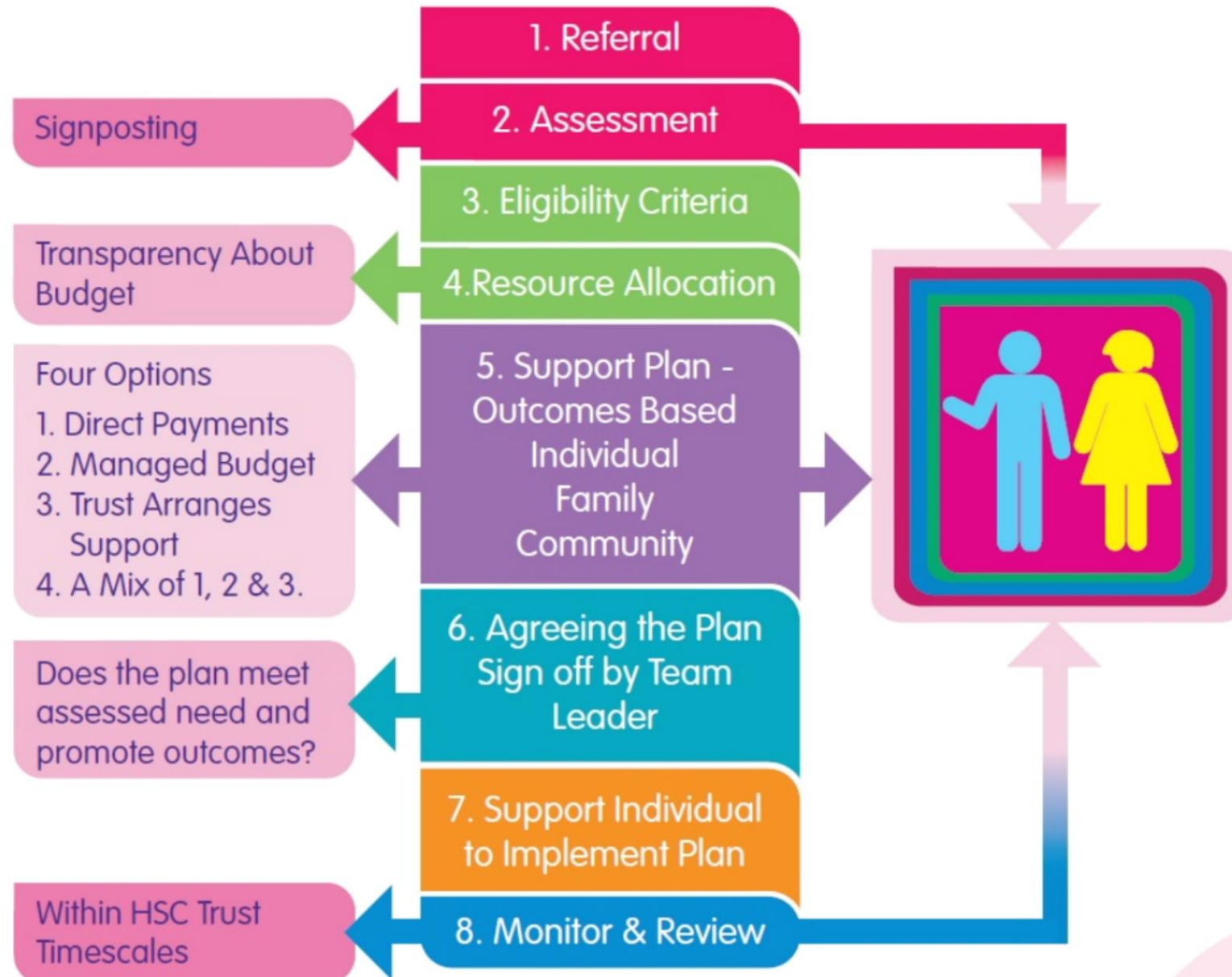
- **Increase and refresh your knowledge of SDS and the role of a PA employer**
- **Consider the essential role Support Planning plays in putting disabled people in control & maximizing personalization**
- **Increase understanding of support available and capacity of CILNI Advice & Support Service**
- **Share how you can create a smoother experience for Trust service users**

# self directed support



for support that's as individual as you are

# Self Directed Support Pathway



# Personalisation

The process by which Trust provided services can be adapted to suit you. Personalisation is the person's right to determine their own life and shape any support that they may require to live their life.

## Self Directed Support

A change to the way the social care system operates to give you choice, control and power over the support you receive.

## Personal Budget

A Personal Budget is a sum of money identified by the HSC Trust to meet the assessed needs of a person who is eligible for social care support.

Direct Payment

Managed Budget

Trust Arranges Support

Mix and Match



# Trust Resource Allocation

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**£12.91 -  
Does one  
size fit all?**

think

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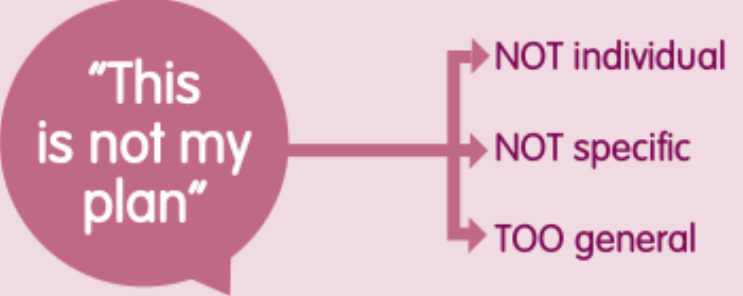




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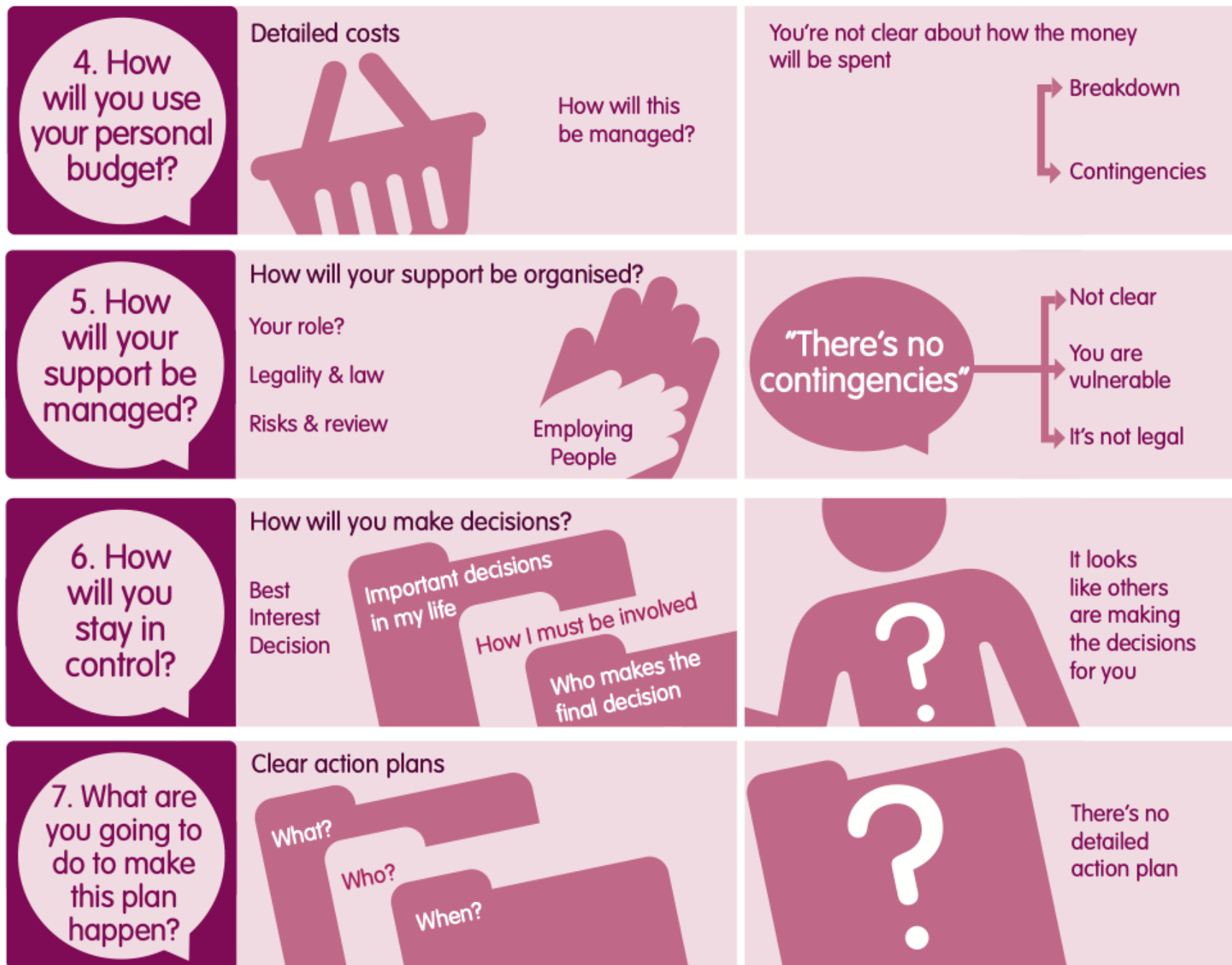
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Criteria	What this means	The plan will not be agreed if
<p>1. What is important to you?</p>	<p>All about you</p> <p>Who are you?</p>  <p>Likes &amp; dislikes</p> <p>Dreams</p> <p>Interests</p> <p>People</p>	<p>"This is not my plan"</p>  <p>NOT individual</p> <p>NOT specific</p> <p>TOO general</p>
<p>2. What do you want to change and achieve?</p>	<p>Changes you want to make</p>  <p>Where you live</p> <p>What you do</p> <p>Your support</p> <p>Short &amp; long term</p>	 <p>NOT clear</p> <p>Will not deliver the desired outcomes</p>
<p>3. How will you be supported?</p>	<p>What we need to do to support the above</p>  <p>When?</p> <p>Where?</p> <p>Who?</p> <p>Health &amp; Safety</p>	 <p>NO detailed plans for support</p> <p>Looks like you are at risk</p>





Self Directed Support  
choice • control • independence

# self directed support





## practitioner guide





**Working  
Well**

**Not  
Working**

	Mornings 	Afternoons  	Evenings 
Mon			
Tues			
Wed			
Thurs			
Fri			
Sat			
Sun			

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**HELP AVAILABLE FROM CILNI FOR THOSE  
WHO WISH TO EMPLOYER THEIR OWN  
PERSONAL ASSISTANTS (PAs)**





# Recruitment

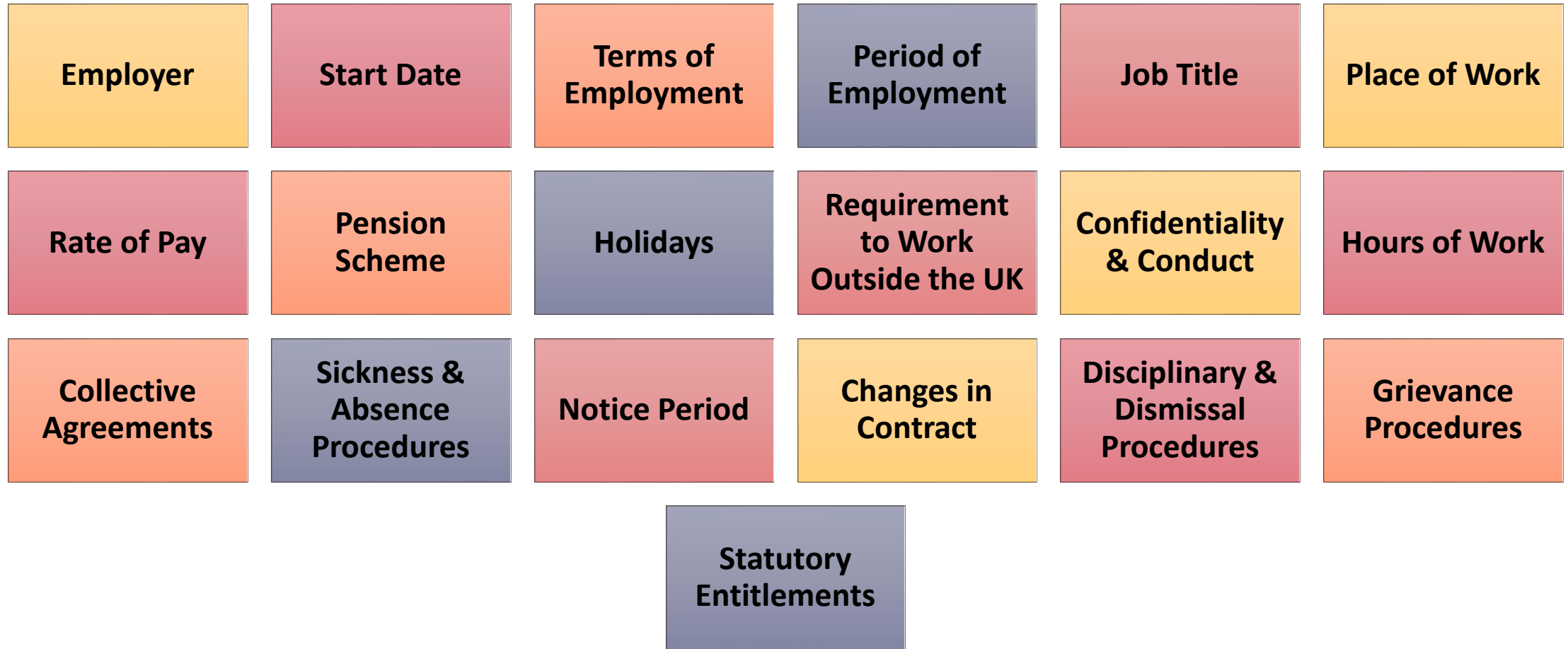
- Job Description
- Person Specification
- Advertising
- Interviewing
- Terms & Conditions



# Legal Responsibilities

- Employer & Public Liability Insurance
- Health Safety Legislation
- Terms & Conditions of Employment
- HMRC Rules and Regulations
- Workplace Pension Regulations

# Terms & Conditions of Employment



# Managing their PA redundancy procedures

Minimum Three Step Procedure -

- Step One - Put it in writing
- Step Two - Meet to discuss the issue
- Step Three - Offer Right of Appeal


Clients should contact their Employer Insurance Co to lodge a claim if appropriate

MUST consult their Insurance company 24 Hour Helpline

**Trust must consider topping up balance in DP account to cover all costs associated with making staff redundant**



# Budgets & Surpluses



All the numbers behind a personalised budget...

# Budget Overview



Funding Sources

Administrative Costs

Care Providers and Personal Assistants

Additional Expenses



£12.91 is **not** what the  
employee will be getting!

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# Employer Expenses

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PENSIONS



NATIONAL  
INSURANCE



SICK PAY



ANNUAL LEAVE  
COVER

£12.91 is **not** what the  
employee will be getting!

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# Simple & Personalised Budget

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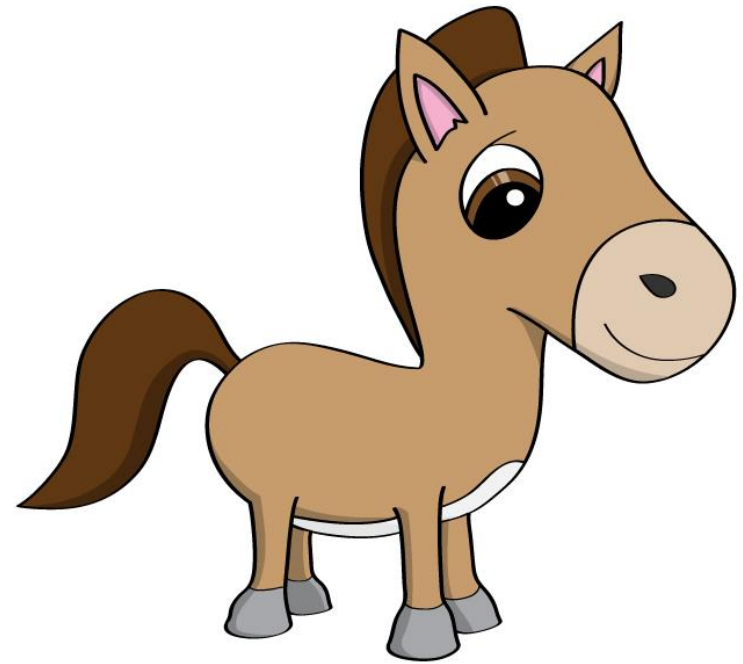
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# Surplus Overview



Funding & Account Balance

Advanced Payment Retention

All Expenses

Annual Leave & Carry Over

13th Payment Savings

# Surplus Calculations



## Surplus Calculations

Name of Employer	Joe Bloggs
Date	31/07/2021
Amount in employer's Bank	£ 15,563.26
Weekly Personal Budget	£ 387.30
<b>Advanced Payment from Trust</b>	<b>£ 1,742.85</b>
Total Unpresented Cheques	£ -
Wages due before next Trust lodgement	Yes
Wages & S/Orders due before next Trust Lodgement	£ 1,530.00
Payroll Costs	£ 27.00
Amount Saved for Planned Activity	£ -
All Annual Leave Reported	Yes



## Surplus Calculations

All Annual Leave Reported		Yes
Is Annual Leave Carry Over Allowed		Yes
How much Annual Leave can be carried		4 weeks
Amount Required for Annual Leave Cover	£	550.61
Payroll Cycle		4 Weekly
Is a 13th Payment Required		Yes
Savings required for 13th Payment	£	1,530.00
Insurance Premium	£	99.00
Any Additional Costs	£	-
Total Deductions	£	5,479.46
<b>Account Surplus</b>	<b>£</b>	<b>10,083.80</b>

£12.91 is **not** what the  
employee will be getting!

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How, as a Trust Key  
Worker, you can help...

To Create A Better Experience

How, as a Trust Key  
Worker, you can help...

To Create A Better Experience

## Identifying the best person to be the PA Employer

1. Choosing the right employer
2. Identify who is available to help
3. Reviewing the employer

How, as a Trust Key  
Worker, you can help...

To Create A Better Experience

# Identifying the best person to be the PA Employer

## **1 Choosing the right employer**

- Will the employer need help with reading information sent to them?
- Are they going to be able to fairly manage staff schedules, disputes, etc?
- Will they need support to manage their money once a budget has been set?

How, as a Trust Key Worker, you can help...

To Create A Better Experience

# Identifying the best person to be the PA Employer

## **2 Identifying who is available to help**

Trust Key Worker, trusted friend, allocate extra DPs to pay someone to give assistance, etc.

How, as a Trust Key  
Worker, you can help...

To Create A Better Experience

# Identifying the best person to be the PA Employer

## 3 Reviewing the employer

- Are they still able to carry out their role?
- Have they developed a long-term disability/illness making it difficult for them to meet their employer responsibilities?
- Have they now too many other demands on their time?

How, as a Trust Key Worker, you can help...

To Create A Better Experience

# Keep Yourself Informed of PA Employer Responsibilities

## As a Trust Key Worker, consider the complete DP "lifecycle"

**Recruitment** – identifying roles, fulfilling all legal requirements associated with becoming an employer

**Fulfilling ongoing employer responsibilities**, including financial management of the DP

**Closing A Payroll** – Trust & employer responsibilities



How, as a Trust Key Worker, you can help...

To Create A Better Experience

## Keeping your Service Users Informed on their Budgets & Timescales

### **Please put it in writing...**

- Personal Budget amount
- Date the money will go into their DP account
- Changes to their PB (increases in hourly rates, hours, etc.) and when this will happen
- New Trust requirements as they change

# Summary of Creating The Best Experience



# Questions & Answers

**Ask away...**

# Promoting Independence for Disabled People

[Find out more →](#)

Check out our handy FAQs to see responses to commonly asked questions

[Read our FAQs >](#)

# For More Information

# www.cilni.org