

# Section 8

## Living life/ Review and Learn



## Section 8: Living life/Review and learn

### Financial and outcome monitoring

When the Council assesses people and gives them a care package they have a statutory obligation to monitor finances and the quality of the service that is provided. This is because the Council has a 'duty of care' to ensure that anyone who is eligible is receiving a good quality, safe service that is able to meet the individual's needs and is not (based upon the information provided) putting that person at risk. Similarly, the Council has a responsibility to ensure that the money spent on purchasing the service is being used responsibly and appropriately.

This responsibility is the same in self directed support. Although you can choose the way you meet your outcomes and how you spend your budget the Council still needs to monitor these with you.

### 6 week review

As with the start of any new care package, 6 weeks from the start date of the package your care manager will arrange to come out and review how things are going. This is to check that the package of care and support that has been set up is appropriate and able to meet your needs.

This is the same when you are directing your own support through either a Direct Payment or a personal budget. Your care manager will visit you and check that you have been able to start receiving your money (if you are managing your finances) and receiving your support. This could include checking that you:

- Are happy with how things are going.
- Have either recruited or are on your way to employing any Personal Assistants.
- Are satisfied with the level of support you are receiving and that it is able to meet your eligible needs.
- Know how to make any changes in order to help things work more effectively.

This will be your chance to talk through any concerns you have and receive support or advice to make changes. This will be the last time your care manager will be in touch with you for a while so it is recommended that you make notes and get prepared so that you are able to get the most out of this meeting. You will be given a copy of your review for your records.

## 6 month outcomes review

When you have been directing your own support for 6 months, a reviewing officer will arrange to meet you to check that things are going well. This is called an 'Outcomes Review' as it will focus on the outcomes set out in your support plan at the beginning of the year.

The reviewing officer will look at things like:

- Have you begun achieving the outcomes as set out and agreed as part of your original support plan?
- If not, why not? If yes, what's next? (This could be maintaining those good outcomes or looking at other areas that you would like to focus on).
- If you have not been able to start achieving the outcomes set out in the original plan this could be because:
  - The original goals were unrealistic.
  - Your needs or the situation have changed.
  - You require further support to achieve the outcomes identified.
  - The money in your budget is not being used in the most appropriate areas.

Your reviewing officer will be able to advise some ways that you may like to re-work your plan to help you get focused. You will be given a copy of your review for your records.

## Financial monitoring

The Council needs to ensure that your personal budget is being used for its intended purpose. One way this can be measured and evidenced is by the submission of the front page of your monthly bank statements. We can see from your monthly bank statements that you are managing your money appropriately; for example, you are not overdrawn or have a surplus in your account, as this could indicate difficulties and could prompt a visit by a Finance Officer.

It is recommended that you record your purchases by keeping a log and receipts for these. After you have followed these guidelines for the first 6 months of receiving your personal budget it can be decided whether you need a different level of support – more or less. This may include changing the records you are required to submit in the future.

***If you experience ongoing difficulties we may need to look with you at other ways of managing the personal budget.***

The Council is committed to giving people the opportunity to direct their own support by using a personal budget. However, we need to work together to ensure that people are being supported appropriately. If you require any further information or advice please contact your care manager.

# Improving your plan

There are many tools developed by Helen Sanderson Associates which can be used to develop and refine your support plan. We have mentioned some of these already. The ones on the following pages can be used in addition to the previous tools to review how things are going.

Among them are:

- 4+1 Questions
- Learning log
- Working/not working

### 4 + 1 Questions

This helps you focus on what you are learning from your efforts based on what has been tried, learned, what you are pleased about and concerned about. And, given that learning, a way to focus future efforts.

- 1) What have we tried?
- 2) What have we learned?
- 3) What are we pleased about?
- 4) What are we concerned about?

Given what we know now, what next?

### Learning log

This reviews situations/events and allows you to analyse how things went.

Date and time	What did you do? (what, where, when, how long?)	Who was there? (names of staff, friends and others)	What did you learn about what worked well? What did you like about the activity? What needs to stay the same?	What did you learn about what didn't work? What didn't you like about the activity? What needs to be different?

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### Working/not working

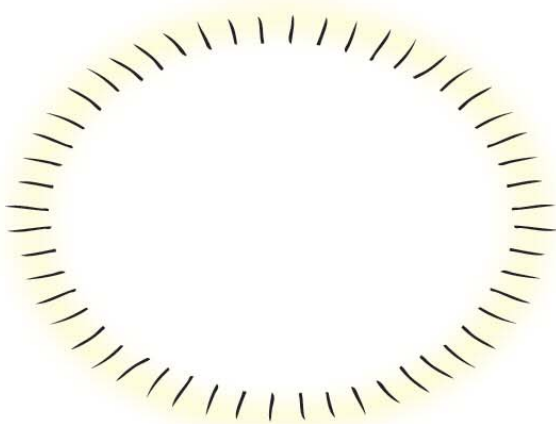
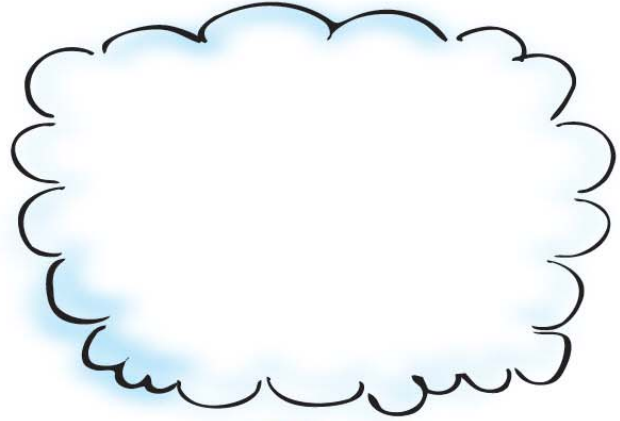
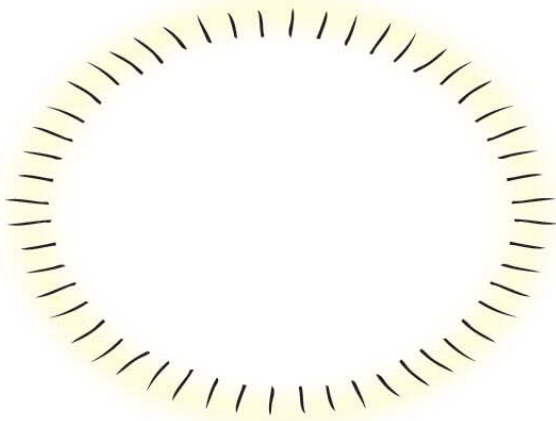
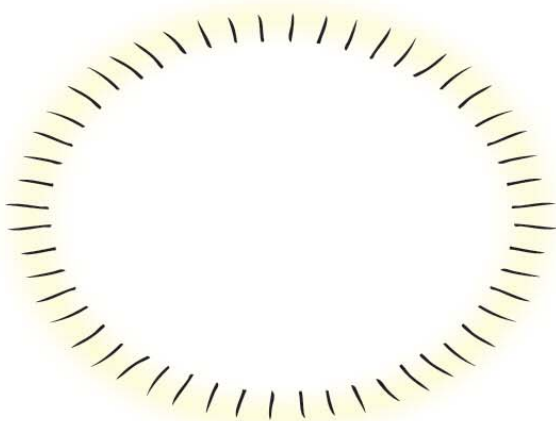
This helps to analyse an issue/situation across different perspectives/from different people's views and provides a picture of how things are right now. You can either use the table or the graphic.

	What's working	What's not working
Perspective 1 Name: .....		
Perspective 2 Name: .....		
Perspective 3 Name: .....		
Perspective 4 Name: .....		

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**WORKING**

**NOT WORKING**



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