

London Borough of Lambeth

Self Directed Support

# Personal Budget Agreement



Lambeth - Adults & Community Services



This Agreement is about your money and how Lambeth will pay you.



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## 1. About You and Social Services



This Agreement is between : -

<b>Name:</b>	Lambeth Adults & Community Services
	(This Agreement says 'we' or 'us' because it's shorter)
<b>Address:</b>	Phoenix House 10 Wandsworth Road London SW8 2LL

and

<b>Name:</b>	
	(This Agreement says 'you' because it's shorter)
<b>Address:</b>	

and

<b>Name:</b>	
	(This Agreement says 'you' because it's shorter)
<b>Address:</b>	

## 2. Before you make this Agreement

Before you make this Agreement you must:

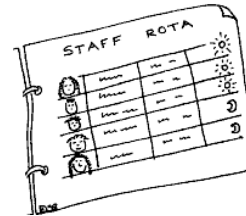
- **be eligible**  
an assessment will be made which says you can receive community care services



- **have a support plan** or care plan that says what support you need



- **want to organise the support** written down on your plan



- **able to organise that support** – perhaps with the help of someone else like an agent.



### 3. Personal Budget Payment



#### How much money we will pay

Your personal budget will be	<b>£ 500.00</b>	<b>Each week</b>
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This is made up of:

From Lambeth Social Services	<b>£ 300.00</b>	<b>Each week</b>
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It is also made up of:

Your contribution	<b>£ 100.00</b>	<b>Each Week</b>
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Note: This would have been calculated through the Fairer Charging Financial Assessment and the amount needs to be paid into your Personal Budget account.

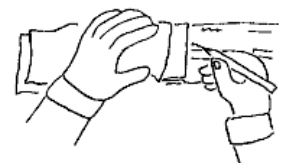
It is also made up of:

Other funding	<b>£ 100.00 (ILF etc.- Please edit)</b>	<b>Each Week</b>
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Note: The ILF you may receive will be deducted from the total amount of your Personal Budget.

#### How we will pay you

You will have been given a few options for receiving and managing your money.



The Money Management Option that you have chosen is:	<b>Insert the money management option that has been chosen</b>
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All your support money can go into your **Bank Account / Third Party account / Pre-Paid card / Trust**. If you get money for support from the ILF or anywhere else, this goes into the same account.

If you have an agent, your money can go straight to them.

#### 4. How long will this Agreement last?

This Agreement starts from the date we first pay you. The Council reserves the right to make amendments to your Personal Budget Agreement and to your Money Management Option.

#### 5. General rules about using the money

The money is to buy the support you need as specified in your Support Plan. If you wish to change your support plan you must get in touch with your Case Coordinator / Social Worker.



If you use the money for items that are not specified in your Support Plan we reserve the right to ask for the money to be refunded back to us, or returned to your Personal Budget account.

You should not use the money in your budget for investment or for surety against any kind of loan(s).

If you want support from a care organisation, we strongly recommend that you go to an organisation registered with the Care Quality Commission, (CQC). They inspect the work of registered organisations. Your Case Coordinator / Social Worker can give you a list of registered organisations near you.

#### 6. Records you must keep

Our monitoring policy is based on people having independence and choice, but they also have a responsibility. It is reasonable to ask you to account for how you have spent your Personal Budget in achieving your Support Plan outcomes.



It is your responsibility to manage the money from the chosen money management option. You are also responsible for bank charges, legal charges, or Inland Revenue costs (costs for any staff that you employ). You must use your Personal Budget Payment legally.

You need to keep a record of your expenditure in the form of receipts and invoices. You also need to keep bank statements and all records of payments made.

You will be required to send in copies of your records, which shows how you have spent your Personal Budget. Please refer to the Monitoring Fact Sheet for details of the monitoring required.



## 7. Surplus in your Personal Budget account

Depending on the value of your Personal Budget you can accumulate 1-2 months payment. This can be used for the following

- Respite
- HMRC
- Equipment

If your Personal Budget account builds up more than this amount we reserve the right to request this money back, and we will refer you back to your Case Coordinator / Social Worker who will review your support plan.

## 8. Change of Circumstances

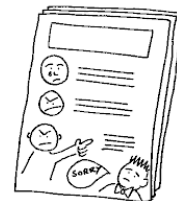
If your needs change you must contact your Case Coordinator / Social Worker who will review your current situation.



## 9. Comments and Complaints

We would be pleased to receive comments about the service and we will respond in writing to you.

If you have a complaint about the service then please contact the Complaints Officer on (020) 7926 9694



## 10. Ending the Agreement

This agreement can be terminated by either you or us. The termination by either party must give 4 weeks written notice.



Please contact your Case Coordinator / Social Worker to discuss this decision.

### Reasons for the termination of the Agreement

- Non Compliance with the agreement
- Using the Personal Budget illegally
- You choose to end the service or the Social Worker/ Care Co-ordinator reviews the plan and you no longer need the service.

## 11. Signatures

Here we and you sign the Agreement.



### 1<sup>st</sup> Party

<b>Name:</b>	Us: Lambeth Adults & Community Services
<b>Signature:</b>	
<b>Date:</b>	

### 2<sup>nd</sup> Party

<b>Name:</b>	You The person receiving the Personal Budget Payment
<b>Signature:</b>	
<b>Date:</b>	

### 3<sup>rd</sup> Party

<b>Name:</b>	Anyone else who needs to sign
<b>Signature:</b>	
<b>Date:</b>	