

HOW TO

Be Your

Own Boss

Self Directed Support

A Step by

Step Guide

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Have you thought that when you need support in your home to keep your independence that you might want to recruit and employ your own staff?

Until recently you will have had to rely on others to arrange any care for you.

This could be Social Services organising a home care agency to send staff into your home. Or maybe a family member, friend or neighbour helping you out day to day. Perhaps you have regular visits from your local District Nursing team or the night visiting service, the Night Owls.

There is also the more intensive **short term** support following discharge from hospital from **Reablement Teams** of Occupational Therapists, Physiotherapists and paid care staff. The hospital social worker will have arranged this service to help you get back your independence.

As this service is only for a limited period of time you will need to see if you need **support to continue after they leave and plan for that.**

There is now a different way of doing things. It gets called many things by the professionals.

You might hear “Personalisation”, “Direct Payments”, “Personal Budgets”, “Individual Service Funds”, “Managed Accounts” or “Self Directed Support”.

When you have real choice and are in control we call it “Being Your Own Boss”.

Social Services are able to set aside the amount of money you need to pay for your support needs (a **Personal Budget**). They can manage it for you **OR** you can ask for another organisation to manage it on your behalf **OR** you can set up a bank account to receive a Direct Payment.

And from October 2014 you are entitled to ask for your **Personal Health Budget** too from the NHS. This will be via the local Clinical Commissioning Group **or CCG**.

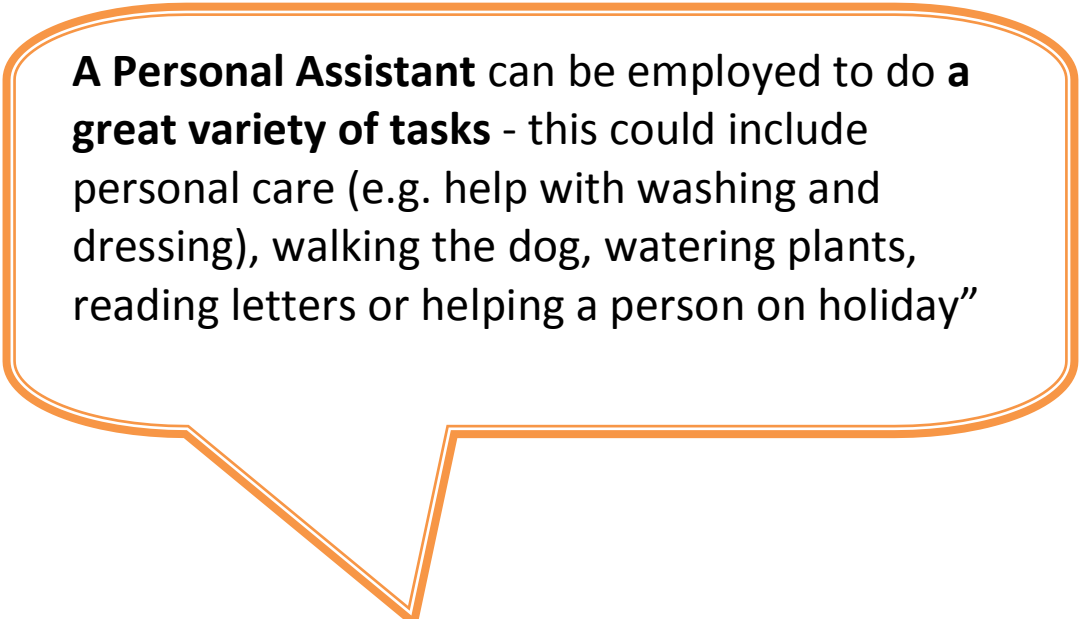
Over the next few years the government are looking at being able to bring both social care and health funds together in one pot.

They are calling this “**integrated personal commissioning**”.

And of course if you have the income you can **fund your own care** or **top up** what you are entitled to.

If you decide to **employ your own staff** they are known as **Personal Assistants (PAs)** rather than carers, care workers or Home Helps which **means the service is unique and personal to you**.

Of course this control comes with the responsibility of being a good employer but **you will see the benefits every day** as you decide **who** comes into your home, **when** they arrive as well as **what** you want them to assist you with.



A Personal Assistant can be employed to do a **great variety of tasks** - this could include personal care (e.g. help with washing and dressing), walking the dog, watering plants, reading letters or helping a person on holiday”

Alzheimer’s Society Factsheet on Personal Budgets.

We have put together this Step By Step Guide to help you think about all of your options.

Take your time to go through the whole guide.

Do not feel that you have to read it in one sitting.



And look out for the Top Tips drawn from the real life experience of older people who employ their own Personal Assistants.

THE EIGHT STEPS

- 1. Ask yourself – is this the right thing for me?**
- 2. What support do I need to remain independent, safe and well?**
- 3. What do I need to do to be a good employer?**
- 4. How will it all be paid for?**
- 5. If you decide to go ahead create a Job Description, an advert and a timetable.**
- 6. Recruit your staff.**
- 7. Start your Personal Assistant/s in post**
- 8. Get on with your life.** Carry out regular reviews.
And go back to Step 6 whenever you need to.



YOUR FIRST STEP

Decide if this is something you would be interested in looking into. Talk to your family and friends to see what they think. Keep an open mind. This Guide is a good starting place.

You can have assistance so do not feel you have to do this on your own or that you have to be someone who has employed staff in the past. If you are facing a **sudden change in your circumstances** get a temporary arrangement in place that then gives you time to plan properly.

One Older Person Said

I am happy with my team of Pas. I have two people I know well. They know where to find things and what to do. I talk to them about when they come and can swap around if needed. One of my PAs even escorted me to the dentist.



No one has to make this change.

You can always stick with what you know and what you already have if you are happy with it. Remember you are entitled to a high quality of support from whoever provides it and you should be at the centre of any care given to you.

If you are unhappy with the care you get from a care agency then tell Social Services or ask for a **Home Care Quality Check** from us here at AgeUK Lewisham & Southwark. **Tel: 0207 358 4076.**



YOUR SECOND STEP

Be clear about what support you need.

We know that older people really value these 3 things

- ✓ Keeping their independence
- ✓ Keeping in touch with family and friends
- ✓ Keeping active

So with this in mind think about the different days of the week and what needs to happen every day for you to remain independent, in control and in your own home.

Social Services will want to support you in this and will want you to remain safe and well. If you can - draw up a weekly plan.

My weekly plan							
	Mon	Tues	Weds	Thurs	Fri	Sat	Sun
Morning							
Lunch							
Afternoon							
Evening							
Overnight							
Weekly chores?							
Emergency contact:							
Contingency plan (who can help at short notice) :							

Some things to consider:-

- ✓ You might need help to get up, washed and dressed and then assistance to get back into bed at night-time.
- ✓ Would you like to be reminded about your medication?
- ✓ Do you need assistance with preparing and eating your meals?
- ✓ How about going to the toilet?
- ✓ Do you like to have a daily newspaper?
- ✓ Is there a weekly shop or do you need help unpacking a shopping delivery?
- ✓ How about your laundry – how often does this need doing?
- ✓ Are you on top of your paperwork and bills?
- ✓ Do you have to use any specialised medical equipment?
- ✓ Do you need help to go outside of your home?

Think about the timings of all the visits and consider whether any of these tasks need **two people to help you at one time** for instance taking a bath or shower. (This is called “**doubling up**”).



Social Services also have a duty to support any of your **(unpaid) carers**, who can ask for an assessment in their own right.

Once you have put everything you can think of in your weekly plan with some rough timings you can work out how many hours of support you need from a Personal Assistant -or team of PAs.

Some of your support needs may be met by family carers, friends or neighbours. For instance a neighbour may pick up your newspaper when they get their copy. Your relatives might do your shopping or help with paperwork and bills.

There will be things you can do for yourself and just need some assistance with.

Do you go out to a club or Day Centre?

Do you have a volunteer befriender?

Everyone will be different.

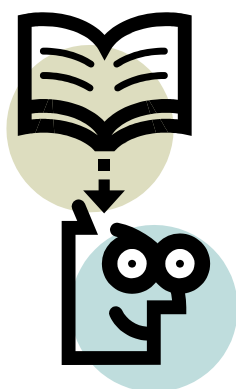


YOUR THIRD STEP

Find out what exactly what you need to do to

“Be Your Own Boss”.

There are a number of organisations that specialise in this area and they have resources you can look at or people to talk to.



You can read the excellent Toolkit produced by Skills for Care (updated September 2014) that has all the papers you need called

“Employing Personal Assistants”.

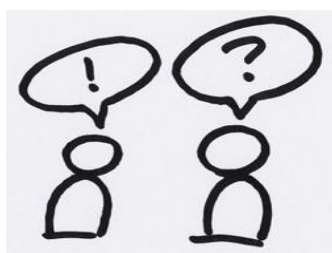
In this Toolkit there are samples of everything you will need such as a Job Description, an advert, a job application form, an interview checklist, all the letters you will need to use, a contract of employment etc.

Just ask Skills for Care for a copy.

If you can visit the website all the information is available there.

www.skillsforcare.org.uk

Tel: 0113 245 1716



You can talk to someone who has more of the detailed information you need.

In Southwark this could be **Stroke Care**

www.strokecare.org.uk. They support people with employing Personal Assistants

and have an in-house payroll service.

You do not have to have had a stroke to be eligible just give the manager, Fay Hall, a call on **Tel: 0207 277 1188.**

And there is the Southwark Resource Centre too; they have lots of information about what you are entitled to and how to remain independent. **Tel: 0207 525 5219.**



You can search online for information and resources (or get someone you trust to do it for you if you do not have a computer or internet access).

A disability led organisation like the Richmond Users Independent Living Scheme (**RUILS** www.ruils.co.uk) now works across London and has lots of information on recruitment and even has a **find-a-pa** section.

They have a contract in neighbouring Lambeth.

You can phone or email Paula Buckton **Tel 0208 831 6088**
paulabuckton@ruils.co.uk

Please see more information about RUILS under Step Five (Page 15).



There are a small number of Insurance Companies which specialise in cover for when you employing staff in your own home. Contact a couple and discuss their premiums and cover options.

FISH **Tel: 0333 3313757**

PREMIER CARE **Tel: 01476 514478**



YOUR FOURTH STEP

At this stage if you are thinking you do want to employ your own **Personal Assistants** you need to be clear about how you will fund the salaries of your staff and pay all the other costs –such as your insurance cover premium and any fees for a payroll service if you are not doing this yourself.

- You may be in a position to pay for everything yourself. This is known as “**self funding**”.
- You may have a Social Services support plan so will have a **Personal Budget**. It could be that the Council pay for all of the costs or some of the costs with you making a financial contribution. They will carry out a financial assessment.
- You may have been assessed because of your health needs and be funded by the NHS .**Your Personal Health Budget comes from the Clinical Commissioning Group or CCG**. You are not assessed to make a financial contribution as you have paid into the NHS all of your life.

Personal Assistants should receive the London Living Wage.

This is reviewed annually in November and at the moment is £9.15 per hour.

This means you need to have more than the £9.15 an hour budgeted to cover all of your extra costs.





If either the council, or the NHS, is funding you ask for an indicative (or estimated) budget in writing at this stage.

If you are funding yourself you need to make sure that your regular income will cover the monthly outgoings for the foreseeable

future. It would be unfair to give someone a contract of employment and then not be able to continue funding their salary after a short period.



If you are funded by Social Services they will give you a small amount of money to set things up.

This pot of money can be used to cover the cost of printing forms, postage, advertising, your first insurance premium and other costs like the fee for the enhanced Disclosure and Barring Check.



YOUR FIFTH STEP

Decide if you do want to employ your own staff.

If the answer is YES sit down and work on your Personal Assistant's Job Description, the advert and the timetable for

recruitment. Hopefully you will have someone who can help you do this.

The **Job Description** (known as a JD) is a document that says everything that the PA will be expected to do **day to day** in the job. There is a good template in the Skills for Care Toolkit.

You need to write down any personal care tasks, domestic tasks and any social activities you need assistance with such as being escorted to places. Do you need someone who can drive? Do you have any pets that will need care and attention? **Remember you can look at your weekly plan to make sure you include everything.**

You get to say what qualities you are looking for in this person such as **“being a good listener”** and **“willing to learn”**. You need to decide if you want the person to have any formal qualifications. In terms of the person specification you get to say what is **essential** (skills, knowledge or experience they must have) and what is **desirable** (things that would help in the role but are not essential). **This is your chance to make the job role very personal to you.** One older woman who has a team of 4 Personal Assistants was very clear that anyone working for her must like – and not be allergic to – cats.

It really helps if you put everything in you can think of at this stage as it will help with wording the advert, reading any returned application forms and deciding who you want to interview, as well as setting the questions at interview and most importantly preventing the PA saying, **“That is not in my job description”** and refusing to assist you.



TIP There is no one recognised qualification for being a PA. There are a number of different health and social care qualifications and training in lots of related subjects. **Often the best thing is to have someone who is caring, compassionate and willing to take clear instructions** (i.e. not someone who wants to take over).

If someone has the right attitude and approach they can be **shown or trained** in how to meet your specific personal care needs and in the use of any equipment.

Once you have a job description you are happy with think about the wording for a short advert.

Do you have what it takes to be a Personal Assistant?

We are looking for a **Personal Assistant** to enable an older gentleman live independently in the **SE5 area**.

We are looking for someone who is **caring, efficient, a good time keeper and reliable with a positive & cheerful attitude**.

You will join a **small team** covering **seven days a week** on a rota basis and the hours can be worked between 8.00 a.m. until 8.00 p.m. Duties will include personal care, some domestic tasks and escorting duties *(as and when needed)*.

The rate of pay is **£9.15 per hour** (London Living Wage). The contract will include **cover** which means you will be asked to step in when your colleagues are on holiday or off work so **you do have to be flexible**.

If you are interested in this position please call **(insert name and number)** by the **(insert date)** to receive an application form.

The successful applicant will need an enhanced Disclosure and Barring certificate (DBS).

If you know when you plan to interview you can add this date into the advert.



Where do you want the advert to appear? Do you want to pay for a small ad in the South London Press? Ask to put it up in a nearby shop window? Ask your local Job Centre Plus to promote? See if there are any online forums covering your area. Ask voluntary organisations like AgeUK

Lewisham and Southwark, the Southwark Resource Centre or Stroke Care to send it out to their networks?

The wider you can get your advert seen the better chance of getting a good response. It is worth asking your local **Job Centre Plus** to promote it.

There are a number of specialist websites like **RUILS** where for a small fee (£15 for one month) you can post your position. They already have people registered who are looking for PA work and have a Lambeth **find-a-pa** contract. www.ruils.org.uk Tel: 0208 831 6088.



The important thing to remember at this stage is that you do not give your personal details or home address out.

Just use your postcode e.g. "SE5 area" or identify where it is in the borough that you live e.g. "Camberwell", "Nunhead" etc.

By putting a telephone number on the advert you can then screen out any timewasters and only send application forms out to those who are serious about a career as a Personal Assistant.



YOUR SIXTH STEP

Recruiting.

It helps to set out all the key dates for your recruitment.

Make a note in a diary or on your calendar. Use the forms in the Skills for Care Toolkit.

Check in with whoever is helping you that they can do these dates too.

You need a date for returned application forms (known as the **closing date**), a date when you go through and read the forms and decide who you want to ask for an interview (called **shortlisting**) and dates for the interviews (both formal and practical).

Always be prepared to move dates if you need to.

It is important **not to carry out the first interview in your own home** so you will need to find an alternative place – ask AgeUK Lewisham & Southwark, Stroke Care or the Southwark Resource Centre if they have a space. Or you might know another voluntary group or church you can approach. The Job Centre Plus team can also provide an office.

It just needs to be a space that is accessible (easy to get to and in and out of) **and somewhere you can talk in private.**

We recommend a two stage process

- 1. The formal interview where you ask the same number of questions of all the candidates and check on all the paperwork.**
- 2. A practical interview in your home where you call back any suitable candidates.**



The person applying must prove to you that they are legally entitled to work in the UK –if they are not and you employ them you will face a large fine. So check documents carefully – this includes a Passport, an original birth certificate, any paperwork from the Home Office or Visas. **And remember any job offer will be subject to taking up two references and an enhanced Disclosure and Barring (DBS) Check.**

What you are finding out in the interview is the person's suitability to the role and how they relate to you. It is vital to have good communication. So think about what questions you want to ask at interview. There may be particular things they have put on the application form you want to check out. **Is anything unclear?**

Ask to see proof of the person being **legally able to work in the UK**. Check that the two Referees are not personal friends or relatives.

Also it helps to spell out the terms and conditions of the job –what the pay rate is, what the contracted hours will be each week and how the rota works. Ask how this will fit into other things they are doing. This gives the

candidate a chance to let you know about other commitments such as studies or childcare.

It may be that you ask a family member or friend to stand in for you at the first interview stage –for instance if getting out of your home is difficult or you are not feeling well enough.



Remember it is natural to feel nervous when interviewing someone – just as the person being interviewed is likely to be nervous. If you can be prepared in advance, give yourself enough time for each candidate, listen, show interest and record what is said this will all help.

And the more you do it the easier it gets.

Decide at the end of the formal interview stage who you wish to bring into your home for a practical interview and tell them you will arrange this as soon as you can.

At the practical interview you can ask them to do a task for you –make a drink or something more personal. You can chat about how they would see the job fitting in with their life and check out their understanding of the role.

If you are bringing a few people back for a practical interview wait until you have seen everyone and make a decision if you want to offer the job to any of them. Phone the successful candidate/s and if they accept the job offer (subject to getting good references) send that

person a letter spelling out the terms and conditions and giving them a start date.

You must then contact their Referees - preferably in writing. If you decide to telephone the referees have a checklist of things you wish to ask them and make a note of what they say.

You will also need to see each person's Enhanced Disclosure and Barring certificate or start the process of getting the forms for them to complete.

And when they start jointly sign two contracts of employment-keeping one copy each.

Remember to write to any unsuccessful candidates thanking them for their time.

And this is the stage to inform your payroll provider about the start date and give them the information they need to set up the person/s on the payroll system.

Enhanced Disclosure and Barring (DBS) check.

We have found a user led organisation in Essex (Essex Coalition of Disabled People/ecdp). www.ecdp.org.uk.

Tel: 01245 392 300 who offer an enhanced DBS check **per employee at a cost of £62.**

They send the relevant paperwork out to the employee and **get you (the employer) to verify documents** before it all goes back to them. **They check it all and it gets sent to DBS.** It can then take 4-6 weeks. The certificate goes to the employee –**but they have to show this to you, the employer.**

And there is the new service now where for £13 an employee can register for a year to update their DBS –which they can then show to any employer (accessed via a pin number) so your new Personal Assistant may give you this PIN.



YOUR SEVENTH STEP

Starting your Personal Assistant or PAs in the job.

With any new job it is good to have a period where you are shown what to do, where things are and have clear instructions about what is expected of you. If you already have a Personal Assistant – or a family carer- working with you and someone new joins the team let them shadow that person.

It may be that the individual needs training in the use of any specialist equipment – like a hoist. Check in with the new person how they feel about the work –and do not expect them to be able to do everything perfect first time. Everyone has their own way of learning new things.

And remember they may be nervous and will not know where everything is kept in your home or how you like things done.

It is important to give regular feedback on what is working well and what, if anything, you would like them to do differently. Book a time slot in after three months to formally review progress. If there are things you want them to do differently you need to be stating this and recording it as this first six months are known as a **probationary period** – this means that at the end of that time you can confirm them in contract OR extend the probationary period OR ask them to leave if it is not working out.



If you can do a rota a month in advance this will help with diaries and planning. And make sure everyone has up to date contact details should they need to text or speak to each other or you at anytime. Be clear about what you expect to happen in any emergency situation.

Have a clear system for staff to request annual leave as they are entitled in any one year to 5.6 weeks multiplied by the number of hours they work each week. You do need to agree to any request, preferably 4 weeks in advance, so you can make sure you have proper cover arranged. Normally you would not agree more than two weeks leave in any block but this is up to you.

Depending on how your payroll is run the PAs may need to complete timesheets –which will be a record of all their hours worked.

You may decide you prefer a system at home for them to record their shifts. You just need to find the best way to do it for you and to make sure that they get paid the correct wages each month.



As the Personal Assistants will be your employees they must not be in a position where they have access to your **personal bank details**, such as a PIN number for a bank card and it helps to have a record of any money handling in your home – with receipts shown for any purchases made on your behalf.



YOUR EIGHTH STEP Getting on with your life!

It is important to review how things are going on a regular basis-don't let things build up into bigger issues or simply ignore them. And it is good for staff to hear when they are doing a good job.

Remember that your insurers will have a **24 helpline service** for you to talk about any situation you are unsure about.

And hopefully you also have the support of family or friends and maybe another organisation.

If Social Services or health are funding your support plan they will carry out regular reviews to make sure you are still safe and well.

And finally you will have a change over of staff from time to time or your needs may change **so you will need to re-advertise or extend contracted hours or change working patterns.** Just try to be as fair as you can and talk to your staff about your choices and decisions.

After All You Are In Control.

Special thanks go to all the older people, their supporters and Personal Assistants I have been fortunate enough to work with over the life of this two year project.

We have all been learning together.

And to my colleagues at AgeUK Lewisham & Southwark as well as Southwark Council for the Innovation Fund grant.