

# Individual Service Fund (ISF)

## Information for ISF organisations

(version 5)

April 2014

## **1. What is an ISF?**

An ISF is another way in which an individual can manage their Personal Budget, just like a Council Managed Service or a Direct Payment. In agreeing to hold an ISF for an individual, the organisation commits to helping the individual to make the best use of their Personal Budget to meet the outcomes in their support plan. The individual benefits from a more flexible service without the responsibility of managing their money.

## **2. Delivering services**

An ISF organisation can deliver some or all of the services required to meet the outcomes in the individual's Support Plan. Where an organisation does not deliver all the services, they can work with the individual to outsource to another organisation or support them to purchase equipment or other types of support.

For example, an organisation could manage an ISF for an individual where their support plan includes assistance with personal care, equipment to help with the impact of their sight impairment and support to access leisure facilities in their village. The ISF organisation in this case could provide the home care element of the package but could work with the individual to source the equipment and set up a taxi contract to take the individual to a community based activity. This might be a local walking group or exercise class.

An ISF organisation may choose not to deliver any services but to commission them all from other providers with the individual's agreement. The ISF organisation would be responsible for the quality of any service they commission by for example only contracting for home care with a CQC registered organisation or using licensed taxi companies, and for providing audit information to the Council.

Where an individual doesn't use all their support in any one week the hours can be banked and used at another time through working closely with their ISF organisation. This allows individual's with fluctuating conditions the ability to flex their support to use when they most need it.

Either party must give four weeks' notice to cancel an ISF unless there are serious safeguarding concerns for the individual or to care workers in which case the ISF can be terminated within 48 hours. Any request to cancel an ISF must be notified to the Council through Gateway to Care on 0845 11 11 103

### **3. Managing the money**

The money is held by the ISF organisation on the individual's behalf in a separate Trust bank account. It cannot be paid into and spent out of a general pooled account. Each person's money must be moved into their own account where it is easily identifiable and can only be used to provide support for that person.

The organisation is accountable to the person for how their money has been spent and must be able to evidence this to the individual and the Council on request. The organisation will therefore need appropriate systems and processes to be able to manage and account for the individuals funding in a personalised way, with clear recording and an audit trail for each individual.

The value of the ISF is paid to the organisation every four weeks in arrears. Any care charge the individual has been assessed to pay to the Council will be collected from the individual by the Council and not "netted off" the payment to the ISF organisation.

### **4. Audit**

ISF organisations must keep records that easily identify the spend for each individual and send this periodically to the Council to enable an audit to be carried out on the way the Personal Budget has been spent. ISF organisations will be allowed to keep up to four weeks budget in the individual's account and return the balance to the Council if and when requested.

### **5. Marketing & promotion**

ISF organisations will be asked to register with Calderdale Council and all registered organisations will be advertised on the Council's website. Each organisation will complete a one page profile containing the following information:

- a) Contact details
- b) Information about the organisation
- c) Area(s) of Calderdale in which they will provide ISF's
- d) Fees and charges – to include any administration or management fees.

This profile will be held on the organisations website and there will be a link to it from the Council's website. It is the ISF organisation's responsibility to keep this information up to date.

## 6. Frequently asked questions

- a) What is the potential volume of work?

*Calderdale currently provides services to approximately 2200 people across the Borough. Anyone who, following an assessment, has eligible social care needs will be able to choose an Individual Service Fund to meet the outcomes in their Support Plan.*

- b) Where is the work?

*Individuals wanting to use an ISF can live anywhere within the Borough of Calderdale.*

- c) What do I charge to be competitive?

*The Council cannot tell ISF organisations what to charge as this is not a contracted service. Individuals will have to plan their support within an allocated budget and will make their own choices about how they choose to spend it. Some may be prepared to pay more to have what they see as a better service and others will be looking for good value and getting more for their money. Individuals will compare prices and consider what each ISF organisation has to offer before making a choice so it's a good idea to keep your pricing structure simple and easy to understand.*

- d) Is it worth it?

*ISF's offer individual's the opportunity to be involved in the way their care and support is delivered without the responsibility that comes with a Direct*

*Payment. An ISF is a real alternative to a Council Managed Service and although the Council cannot guarantee any work for ISF organisations it fully supports this initiative which has already proved popular with people in receipt of home care services. The ISF organisation can levy a management fee to offset the extra cost of managing people's budgets but the real reward comes from working with people in a different way and arranging support services that make a difference to the way people live.*