



## FINANCIAL INFORMATION FOR CARE MANAGERS

General  
2011/2012

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## **1. INTRODUCTION**

### **1.1 BACKGROUND**

Shared Lives South West is a registered charity and was established in 2004 to provide shared lives services (formerly known as adult placement services) in Devon, Torbay, Plymouth and Cornwall. The organisation was formerly known as SWAPS (South West Adult Placement Scheme).

Shared Lives South West offers Shared Lives services to anyone over the age of 18 who requires accommodation with some care and support. We can also support younger people aged 16+ in transition from foster care services into adult social care services. Our Shared Lives services enable people with support needs to share in family life and be involved in their local community by living with an approved provider as part of their family.

We can support people with a learning disability, people with mental health issues, people with a physical disability, older people and people with dementia. The service cannot offer nursing care. A Shared Lives service can be on a long term basis, or can be regular or one off short breaks. We also offer flexible day time breaks. Shared Lives is usually a planned service but we can in certain circumstances offer a short break service at short notice

Shared Lives South West delivers its service through a network of Shared Lives carers. Our Shared Lives carers have been comprehensively assessed and checked before being approved. Our Shared Lives carers undergo training before and after approval and have to meet agreed standards of care to be part of the scheme

Each of our Carers is supported by a Shared Lives Coordinator (SLC), employed by Shared Lives South West. An SLC will monitor and support the service through regular visits to the provider and service user and telephone support as well as liaise with relevant care managers and other professionals. The SLCs are managed by a service manager – Linus Whitton in Devon and Torbay and Sally Crombie in Cornwall and Plymouth.

### **1.2 CONTRACTS FOR SERVICES**

Shared Lives South West usually operates its services under a contract with the local authority that is purchasing the service on behalf of a service user. This might be under a block contract or as a spot contracting arrangement under an overarching service specification framework, agreed with the authority. Where no contract is in place, this would need to be set up before a service can be delivered.

The following information sets out how in general a Shared Lives South West service would be priced and agreed. This should enable care managers to explain the financial arrangements to service users, calculate the cost of the service to the purchasing authority and take clear financial information to any funding panel.

Shared Lives South West is very happy to assist in calculating the price of a service and how the service could be purchased and commissioned by any local authority.

### **1.3 ORDINARY RESIDENCY**

Shared Lives South West placements are treated as “non residential placements” and are subject to the relevant charging policies for non residential services. Therefore due consideration should be given the Department of Health directive on ordinary residency.

#### **1.4 CONTACT DETAILS**

**If you have any queries about fees and charges, benefits maximisation, payment methods, Fairer Charging in relation to our services or what costs you need to put to a panel - please contact the Funding & Benefits team at the Devon office of Shared Lives South West on 01626 360170.**

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## **2. LONG TERM SERVICES**

### **2.1 PRICE FOR THE LONG TERM SERVICE**

The total price for a long term Shared Lives South service varies from £395 per week to £599 or above per week. The price is made up of

- a) Organisational charges**
- b) Rent and household charges**
- c) Care and support charges**

**Some of this is payable by the service user and some is payable by the purchasing authority.**

### **2.2 HOW THE PRICE FOR THE LONG TERM SERVICE IS MADE UP**

#### **a) Organisational charges**

This is the part of the price that covers Shared Lives South West governance, organisational, regulatory and service support costs and money management services, including benefit maximisation for service users. The organisational charges also include an amount to cover a minimum of 14 days paid breaks per annum for our Shared Lives Carers.

**Organisational costs vary depending on the area and the contract in place – please contact Shared Lives South West to get the cost for your area.**

#### **b) Rent and household charges**

This is the part of the price that covers the rent and household costs associated with the delivery of the service by the Shared Lives carer. This element is the responsibility of the service user. Shared Lives South West supports the service user to claim all eligible welfare benefits so that they can meet this part of the cost.

**For 2011/2012 the rent and household charges are £156 per week.**

#### **c) Care and support charges**

This is the part of the price that covers the care and support offered by Shared Lives South West (through its approved Shared Lives carer). The price for this will vary depending on the needs and expectations of the service user and the effort, time, skill and knowledge required by the Shared Lives carer to meet those needs and expectations.

Shared Lives South West has a banding system with 7 bands. The detailed banding criteria are available on request.

For 2011/2012 the care and support charges are:

Band 1	£127.00
Band 2	£154.00
Band 2+	£178.50
Band 3	£203.00
Band 3+	£226.50
Band 4	£250.00
Band 5 (special level)	£332.00 (minimum charge – agreed individually)

### 2.3 CALCULATING THE COST OF A SHARED LIVES SOUTH WEST LONG TERM SERVICE

The table below shows the total cost of the service at the different band levels and the maximum cost of the service to the local authority. The organisational charge illustrated uses the rate charged for out of county placements, which is the maximum charge. The organisational costs for other areas will vary, and are usually slightly less.

**Organisational charges (inc. VAT) + care and support charge = maximum cost of a long term Shared Lives South West service.**

The final column shows the maximum total amount that would be charged to the local authority. This may be reduced by any service user contribution under Fairer Charging – this will depend on the local fairer charging policy.

Band	Total price	Rent and household charges (payable by service user)	Organisational charges (excl VAT)	Organisational charges (inc VAT)	Care & Support charges	Total cost to OLA (inc VAT)
1	£415.00	£156.00	£110.00	£132.00	£127.00	£259.00
2	£442.00	£156.00	£110.00	£132.00	£154.00	£286.00
2+	£466.50	£156.00	£110.00	£132.00	£178.50	£310.50
3	£491.00	£156.00	£110.00	£132.00	£203.00	£335.00
3+	£514.50	£156.00	£110.00	£132.00	£226.50	£358.50
4	£538.00	£156.00	£110.00	£132.00	£250.00	£382.00
Special	£620.00*	£156.00*	£110.00*	£132.00*	£332.00*	£464.00*

\* Minimum price

## 2.4 STEP BY STEP PROCESS

These are the steps to be taken in identifying and agreeing a price for a service

### Step 1 - Referral

At referral, all financial information should be included so that Shared Lives South West can do an initial check about the financial viability of the service e.g. will the service user be able to meet the £156 rent and household costs; does the service user have any capital that would make them a self funder; is the service user's RAS/individual budget sufficient to meet the cost of the service.

Shared Lives South West can provide some initial estimates of the cost of the service at the referral stage.

### Step 2 – Agree the service to be delivered

If a suitable vacancy has been identified, the service is financially viable and there has been a successful introductory process, the care manager will agree with Shared Lives South West and the service user which elements of the service user's eligible needs are to be delivered by Shared Lives South West through the provision of a long term Shared Lives service.

### Step 3 - Agree the banding level for the service

The level of the care and support element of the price will be determined according to the needs of the service user, the desired outcomes for the service user and the amount of effort, input, skills and knowledge required by the Shared lives carers to meet those needs and outcomes, as agreed by Shared Lives South West and the care manager. This will be based on our detailed banding criteria.

### Step 4 – Get funding approved for the service

The maximum cost of a long term service will be the organisational charge (inc. VAT) + the agreed care and support charge. **This is the amount that should be agreed at any funding panel, noting that any service user contribution may eventually reduce the cost to the local authority.**

The cost of any introductory visits will also need to be agreed at any funding panel along with any mileage. Introductory visits are charged at the applicable short break rates. We are unable to agree any bookings for an introductory short break until the funding is agreed.

### Step 5 – Matching and introductory visits

The arrangement of the service will include a thorough matching and introductory process which may include the delivery of day and overnight short breaks to ensure that the service can safely and appropriately be delivered, that the needs and aspirations of the service user have been fully explored and all parties are in agreement. All introductory stays will be charged to the purchaser as a shared lives short break.

### Step 6 – set up an individual contract

Once funding has been agreed any Individual Contract shall be agreed and signed by all parties.

### **Step 7 – Fairer charging assessment by Shared Lives South West**

As part of our contracted service, Shared Lives South West will support service users to claim all available welfare benefits to maximise their income.

Once all financial information is available, a Fairer Charging assessment will be undertaken by Shared Lives South West to see if the service user can afford to contribute towards their care and support costs. It is possible that some service users will make a further contribution to the care and support cost, reducing the cost to the purchasing authority.

Shared Lives South West will collect all service user contributions directly from the service user in all cases where we are responsible for the fairer charging calculations and the benefits maximisation process.

## **2.5 OTHER INFORMATION**

### **Mileage**

If specific regular trips will need to be undertaken by the Shared Lives carer on behalf of and/or with the service users over and above normal family activity, this will be identified during the matching process. Examples may be, visiting the service user's family some distance away, significant hospital or medical appointments or keeping links with the community, which would be considered over and above normal family travelling. Where this forms part of the service required, this additional mileage would then be charged as an additional cost of the service.

The number of miles and who is responsible for this additional payment has to be discussed and agreed before the start of the service and will be documented in a mileage agreement, which forms part of the overall Shared Lives service agreement. Shared Lives South West will administer any mileage agreements made and ensure mileage claims are paid and invoiced in order to protect the service user and the provider.

The current mileage cost is 40p per mile.

### **Appointees**

Where the service user requires an appointee to handle the claiming and management of benefit income, these arrangements will need to be agreed when setting up the service. The service user has a number of options:

- The service user manages this for themselves
- The service user has an appointee who is a member of their family, or a court appointed person such as a solicitor or the local authority.

- Shared Lives South West offers a services where it can act as a corporate appointee for the service user – where an appointee is required this is our preferred option

For more information about appointeeship and Shared Lives, please speak to Donna Bounden at Shared Lives South West

### 3. SHORT BREAK SERVICES

#### 3.1 PRICE FOR SHARED LIVES SHORT BREAKS AND DAY SUPPORT SERVICES

Short break and day support services are charged at an inclusive cost on a banded basis.

The price of the service will be determined according to the needs of the service user, the desired outcomes for the service user and the amount of effort, input, skills and knowledge required by the Shared Lives carers to meet those needs and outcomes, as agreed by Shared Lives South West and the care manager.

##### Day support services - hourly rates (up to 8 hours)

Band	Total cost (inc VAT)
A	£10.08
B	£10.58
C	£11.08

##### For short break overnight stays of one to three nights

Band	Total cost (inc VAT)
A	£69.01
B	£77.01
C	£92.01

##### For short break overnight stays of four or more nights

Band	Total Cost (inc VAT)
A	£60.17
B	£69.67
C	£82.67

#### 3.2 FINANCIAL ASSESSMENT AND CHARGING FOR SHORT BREAKS

Unlike long term placements, the purchaser is responsible for any financial assessment to ascertain the service user contribution towards short breaks or day support services.

If the purchaser notifies Shared Lives South West of the service user contribution, Shared Lives South West will then collect the service user contributions and invoice the purchaser the net amount of the price payable. Failure to notify Shared Lives South West of any service user contributions will result in the purchaser being invoiced at the gross price.

**Shared Lives South West will not be responsible for collecting any arrears of service user contributions due.**

### **3.3 SHORT BREAK MILEAGE FOR PICK UP, DROP OFF AND ACTIVITIES**

Some Shared Lives carers can offer an optional pick up and drop off service. If you wish to access this service, the number of miles and the responsibility for payment has to be discussed and agreed before the start of the service.

Further mileage may also be chargeable in relation to activities. For example, if the aim of the short break is for the individual to go to specific places outside of the Shared Lives South West carer's normal locality. If this is applicable, the mileage would be agreed and responsibility for payment established before the commencement of the service.

Shared Lives South West administers any mileage agreements made and mileage claims are paid and invoiced by Shared Lives South West in order to protect the service user and the provider.

The charge for any of these services is 40p per mile.

### **3.4 SHORT BREAK CANCELLATION AND RUNNING LATE POLICY**

If a short break is cancelled less than 48 hours before it is due to commence, 50% of the cost will be charged. If the break is cancelled more than 48 hours before it is due to commence, no fees will be due.

If a short break terminates early, at no fault of the provider, 50% of the fees for the remaining booked break maybe charged, minus any service user contribution.

For every break booked there is a two hour time allowance to allow for unexpected/unavoidable delays when picking up or dropping off. Delays beyond two hours or for other reasons will be charged at the applicable day time support hourly rate.

## **4. SHARED LIVES EXTRA**

### **4.1 Shared Lives Extra independent accommodation and support**

Some Shared Lives carers can provide an additional service, which would enable a service user to move on to a more independent lifestyle, living in an annex, flat or house attached to or situated in the grounds of the Shared Lives carers home.

Service users would occupy the accommodation under a licence agreement and pay rent. They would also pay all the utility and household costs related to their accommodation. The Shared Lives carer would then offer a number of hours of support per week to the service user to enable them to develop and maintain their independent living skills. In addition, the Shared Lives carer would include service users in family life and events as appropriate, as in any Shared Lives service.

The service would be accessed through Shared Lives South West, who would match service users to Shared Lives Extra carers and who would also offer ongoing support to the service and the monitoring of the service, as we would with any Shared Lives service.

**Shared Lives Extra services are charged at different rates to our normal Shared Lives service. Please enquire about the cost of this service.**