Social Work Practice Pioneer Project (SWPPP) York

Evaluation report prepared by Jeff Wheelwright for Lives Unlimited and ibk initiatives

March 2013

Summary

This pilot project has demonstrated that skilled, experienced and enthusiastic social work help, provided under the auspices of a well-respected user-led organisation, can make the difference between individuals and families feeling compelled to 'make do' with packages of support made up of the best of existing social care services or planning and managing uniquely personalised support rooted in independence, citizenship and community resources.

The voices of disabled people and families

The voices of disabled people and families were central to the project. Peer support was an important means of offering support and empowering citizens within the project. An event for people and families affected by autism, Gathering Voices, provided an opportunity to send messages to City of York Council about its autism strategy. People at the event agreed this seven-point agenda for action:

- Ask us, work with us, let us do it for you.
- Make it easy to get a diagnosis if we want one, and then to get the support we need.
- Pay attention to the specific things we might need because of autism or Asperger's.
- Remember we want the same things as everyone else:
    o our own home, education and a job
    o not separate, not different.
- Use us to do training.
- Support us to support each other – invest in peer support.
- Work with the communities of York – that's where we live.

Participants in the wider pilot project – individuals, families, groups, coordinators and the independent social worker – endorse this agenda for action as a way of ensuring that the full implementation of personalisation is achieved.

While the project made a positive difference to the majority of individuals and families who took part, the coordinators felt that it was less successful in forging an effective working relationship with statutory agencies and without which, they feel, it will not be possible to make progress on this seven-point agenda. As a result the project coordinators are agreed that the success of the project is limited on this level, and their

strong belief is that there is a great deal of work to be done to develop genuine co-production.

Background to the project

The Social Work Practice Pioneer Project (SWPPP) in York was funded by the Department of Health (DH) and managed by the Social Care Institute for Excellence (SCIE) to test the ability of a user-led organisation to pioneer a new way for disabled and older people to plan and organise the support they need to enable them to live independently in their own communities. The project was designed and managed by Lives Unlimited (an established user-led organisation in York whose purpose is to enable people with support needs to exercise choice and control in order to participate as full and equal citizens) and ibk initiatives (an independent user-led organisation working with disabled children, young people and families to transform the education and support available to them). Throughout this report these two organisations are referred to as the coordinators.

The project is part of a wider policy shift emphasising that people are active citizens no matter what illness or disability they might have, and giving individuals and families with support needs more choice and control in the way those needs are understood and met.

The aim of the York project was to show how the availability of a qualified and experienced social worker, employed independently of statutory agencies, can help disabled people and their families to be in confident control of their own personalised support, without unnecessary bureaucracy. Their relationship with the social worker was not shaped by agency procedures or resources, but was instead focused on and accountable to them.

The commitment to this aim reflected the experience of the coordinators that individuals and families allocated a personal budget often feel unprepared and ill-equipped to research, plan, negotiate and implement complex packages of highly individualised support.

In recruiting a social worker to work with participants, the coordinators were clear that they looked for a holistic strengths-based approach, rooted in relationships of mutual respect and trust, which would:

- ensure the participant was at the heart of support planning;
- concentrate on abilities rather than disabilities;
- strive for social justice and challenge discrimination, disadvantage and exclusion;
- make participants aware of their legal rights and entitlements as part of helping them to improve their wellbeing;
- be proactive, preventative, innovative and creative;

- work collaboratively to enable people to achieve their potential, strengthen family relationships, support families to stay together and help vulnerable people to remain living in their own home or in another place they choose;

- help people to transform and change their lives, supported by safe, strong and caring social networks.

The project plan was to work with up to 12 disabled or older people, people with mental health problems and families, offering the assistance of an experienced and qualified social worker to help them make major life choices in relation to personal support, housing services, leisure, education and employment. A further aim was to provide information and advice to an unspecified number of additional participants through group-based activities and events.

The project started on time, achieved its target level of engagement, has maintained key stakeholder involvement throughout and has been successfully managed within the budget allocated by SCIE.

What the project did and with whom

In their joint bid to SCIE, Lives Unlimited and ibk initiatives described an ambition to:

- *Innovate:* making social work knowledge, skills and methods available in new relationships with individuals and families as a means of empowering them to do things differently and more confidently; exploring new roles for professional social workers.

- *Involve:* using direct work with individuals, families and groups as a vehicle for the sharing of information, experience and expertise in order to strengthen personal development and sustainable networks of peer support for the long term; ensuring that participants can actively influence the implementation of the project and make their own contribution to its success.

- *Integrate:* assisting individuals and families to take account of their whole lives when considering options and opportunities, not focusing on traditional views of care needs; working with and alongside council and NHS services to enable them to fulfil their responsibilities in relation to personalisation.

Evaluation methodology

Evaluation of the project was undertaken by Jeff Wheelwright, an independent social care researcher with more than 10 years' experience of direct payments and personalisation. Information was gathered by:

1. reviewing written documentation relating to the original project application and subsequent press releases, notes of meetings etc. and

2. interviewing participants, council officers, the coordinators and the social worker recruited to work with individuals, families and groups.

The difference it has made for people who use services

Innovation

- All of the participating individuals and families experienced the work of the project as inspiring, affirming them in their hopes for more fulfilling and flexible futures through the management of personal budgets.
- The single most important experience described by participants was of having a relationship with a professional who was committed to person-centred working, whose primary accountability was to themselves as people with support needs, and whose availability enabled time to be spent engaging whole families in planning for improved and sustainable futures.
- The project has provided an effective choice of professional relationships for a person whose need for support was previously unmet due to her refusal to work with the council's officers, with consequent benefits for all parties including the council in terms of both fulfilling its legal duties and making some workload savings.
- The fact that the project social worker was employed by voluntary sector organisations committed to promoting citizenship, and not involved in gatekeeping access to resources, was identified by the families interviewed as being the main reason for their decision to participate.
- The organisations coordinating the project share the core social work values of empowerment, independence and autonomy, enabling them to establish trust in the integrity of the project as an ideal setting for independent social work. In their coordination of the project they have demonstrated their operational ability to manage a professional resource, engage individuals and families in new support networks and promote best practice in self-directed support.
- This experience has confirmed in them a commitment to finding ways to work in partnership with other agencies to achieve both increased take-up and improved outcomes in self-directed support.
- Creative and ambitious support plans achieved by project participants and its existing members, together with its proven capacity for promulgating inspirational life stories through well-established community networks, confirm the ability of Lives Unlimited along with ibk initiatives to provide a local training and development resource to both professionals and citizens in the shared interest of implementing change.

Involvement

- Participants report feeling better informed and more confident as a result of working with the project social worker, improving their prospects for successfully managing their own self-directed support, with less reliance on professional help, in the future.

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- These comments related not just to the one-to-one relationships established by the project social worker, but also to the peer support networks she initiated or facilitated as part of her developmental social work role. The further development and maintenance of peer support networks has reduced what some participants described as a previous sense of isolation and stress, fostering information sharing and reciprocal encouragement as practical complements to existing individual relationships with professionals working for statutory agencies.
- Peer support is already one of Lives Unlimited's greatest strengths in which disabled people and families learn from and support each other. Some of the participants in the project were people with autism and families. Given Lives Unlimited's experience of peer support, it was a natural extension to the project to organise an event for a wider group of people with autism and their families to come together.
- The Gathering Voices event has increased local awareness of the impact of autism on the lives of individuals and families, helping to create a new set of peer support relationships and a dialogue between people with support needs and the council based on the seven-point agenda for action.
- Another theme of the project in which peer support played a part was some families' concerns that they would have to manage their relative's personal budget and support on their behalf. Bringing a group of project families together with members of Lives Unlimited to discuss this enabled them to bounce ideas off each other. As a result one family is experimenting with a model of support and management that employs a support coordinator, meaning that family members are freed to be just that. This is a work in progress for Lives Unlimited and ibk initiatives.

Integration

- Person-centred planning facilitated by the project social worker at a pace and at times suitable for participants has enabled some to make tangible changes to their lives with improved long-term expectations for their fulfilment, community involvement, endurance and health.
- Working with groups to provide information, inspiration and support has been effective in increasing participants' self-confidence and enabling new and ambitious personalised support plans, including the possible pooling of some elements of personal budgets to purchase shared practical help. While this initiative could not reach fruition within the lifetime of the project, the level of interest in it was high, and the coordinating organisations will continue to find ways of maintaining an investment in it.
- Working closely with council officers the project has, on some occasions, contributed to improved outcomes for individuals and families by sharing information, establishing close joint working between professionals and equipping participants to acquire the skills they need to sustain improvements over time and in response to changing needs.
- The project has been most successful where the involvement of the project social worker has been valued by the council as an integral contribution to effective

information gathering, decision-making and resource allocation, and where participants have had a clear understanding of both its scope and its limitations.

- Where the role and activities of the project social worker have created some ambivalence on the part of the council, or where participants' expectations have exceeded the potential influence of the worker, this has led to situations where conflict or confrontation have added delay or additional difficulties for participants and coordinators.

What people said in the evaluation interviews

'Working with her [the project social worker] has been life changing.'

'It's a work in progress, but we definitely feel more confident and in control now.'

'Realistically, what I hoped for was to have someone on my side to help improve the process and be on my side when we have to fight to get what we need. I think I got it.'

'The project brought people together with a focus on our whole family.'

'Previously we have felt as if professionals did things for us or to us, but this has felt like a true partnership. Her social work skills have been very enabling for us and we feel more ready as a whole family to carry on support planning for the future.'

'She [the project social worker] spent time with us so that she could understand us and we could come to trust her – I felt I was under a lot of pressure to accept the ready made support plan that was on offer but she helped me to see that I was important as well and that my views count for a lot.'

'We've had several changes of care manager and this has been frustrating. Your relationship with a social worker is really important and takes time to build up. She [the project social worker] took our views seriously and didn't dismiss them as unrealistic. We are more confident now about making more ambitious plans for our family's future, but we worry about the burden that puts on us in the long term.'

'She [the project social worker] brought us together as a group to share problems and ideas, to learn from each other and to encourage each other. Hearing what other people have been able to achieve was inspiring. We are determined to be ambitious for the future, but we would like to feel sure that help will be available to keep us on track if we need it.'

'There are no imposed restrictions on the time we [care management] can give to each individual or family, but obviously there are workload pressures that we have to respond to. The project social worker could spend more time getting to know people, finding out what they really want.'

Challenges

'We needed someone to coordinate all the things that have to be done if all the planning is going to be successful, but there was a question of how much 'clout' she [the project social worker] had been given.'

'The care plan she helped us make was good, but nothing we wanted to be able to do has come to pass.'

'We hoped she would be able to sort everything out and make sure that everything was in place.'

'Stop commissioning services that we don't want or need – more flexibility with personal budgets, let us be creative!' (Feedback from Gathering Voices, an event organised by the project to bring together people who have autism, their families and council representatives)

Personal stories illustrating the findings

A and family

Person and family-centred support planning

A is a young man approaching the end of his time at school. He already receives direct payments, which are used to employ personal assistants to support him in using community facilities and to pursue his own interests. His family wanted help from the project to plan for a fulfilling and independent future for A, including continuing learning, skills development and volunteering. The project social worker arranged and facilitated a person-centred planning session involving the whole family (including grandparents) at A's home in the evening, commencing with a meal taken together to put everyone (especially A) at their ease before talking about choices, options and commitments. This method of initial relationship-building with A was effective on a number of levels: for A, who has a diagnosis of autism, it enabled him to have trusted people around him and to be in his own familiar environment, which in turn helped him to participate; for his parents, it enabled them to be fully involved at a time of day that was free of work commitments and other pressures; for his grandparents, it provided an opportunity for them to be actively involved in supporting A and his parents as they explored possibilities and considered their own resources; for all the family, it was an affirmation of their place at the centre of support planning – the work of the project fitted itself around their lives rather than requiring them to fit organisational work patterns and availability.

Thinking together of creative alternatives

From this relationship-forming baseline, the project social worker explored creative alternatives to traditional services and presented the whole family with information on which to make informed choices. For example, from childhood A and his family have been provided with regular respite in the form of short stays in a residential facility, and the initial assumption was that this pattern would continue in an adult service setting. The person-centred, whole family approach adopted by the project worker brought to light a concern that a transfer into adult residential respite services would be unlikely to

meet A's own personal and environmental needs and preferences. He enjoys spending time in quiet, calm surroundings with minimal contact with large groups of other people. Working with and guided by the whole family, the project social worker assisted with the development of a support plan involving future respite breaks being taken in a log cabin on a commercial holiday park set in 100 acres of peaceful, wildlife-rich woodland, which A will stay in supported by his personal assistants. This example of a personalised response to an identified need within the family unit for respite provision has proved far more enjoyable for A than time spent in a residential setting would have been, as a result of which his parents feel much happier about the benefits they experience from a temporary relaxation of their day-to-day responsibilities for their son's wellbeing.

More personalised support at lower costs

It is also interesting to note that in this case this form of personalised respite activity costs less than a stay in a registered residential environment would, it uses ordinary community-based resources within the local economy and it provides some illustration of the varied and stimulating work experience of modern personal assistants at a time when social care as an employment sector is struggling to recruit young people.

Capitalising on the networks and promotional activities of one of the project's coordinating organisations, news of A's first stay in a log cabin, including photographs, was posted on the Lives Unlimited website as inspiration and encouragement to other individuals and families to think more personally and creatively about how to use a personal budget to change lives for the better.

J and family

Support planning for a return home from residential college

J is a young man returning home to live with his family at the end of a three-year residential college placement. In anticipation of his return home and his transition into adult services, an assessment of needs had been undertaken, an indicative personal budget had been identified and a support plan based on attendance at traditional day services during the week had been proposed, with an assumed availability of family support at other times.

Supporting families to find family-friendly support solutions

J's mother was worried that he would lose momentum in terms of his continuing development of independence skills, but she felt overwhelmed by the pressure on her to "sort it all out". She was also anxious about the pressure she would be under to give up her own educational and career ambitions in order to become a full-time carer for J.

The project social worker assisted J's mother to identify and explore community-based opportunities for J to continue to be helped to become more independent and to have his needs met in more personally specific ways. This involved gathering information about a range of complementary services and activities, including costs, and this in turn led to a case being made to the council for the indicative budget to be substantially increased. On the strength of the comprehensive and skilled intervention of the project social worker this case was established and acted on.

"A changed person…"

J's mother describes support planning for her son as a work in progress, but said that the project had been liberating for her in enabling her to articulate her own needs alongside those of her son. At the close of the project she described herself as a "changed person, better equipped with knowledge, skills and personal confidence to participate fully in the continuing process of support planning." For her, the short-term outcome of her involvement with the project was a marked improvement in the processes of participative needs assessment and support planning, which in turn would be reflected in better long-term support outcomes for both J and the whole family.

Ms X

Offering an alternative …

Ms X had support needs that were known to and accepted by the council but they were unable to assist because she was unwilling to work with care managers employed by the council. This compromised her safety and wellbeing and prevented the council from fulfilling its duties. Care managers were pleased to be able to inform Ms X of the availability of a social worker employed independently of the council, and subsequently to introduce her to the project.

Working together to improve outcomes

The project social worker was able to gain Ms X's trust and to engage with her in confirming her eligible needs and constructing a support plan. The worker's professional judgement and recommendations were respected and acted on by council officers: "We developed a complementary professional relationship through continuous communications. We trusted the project social worker's assessment and recommendations: she helped Ms X to develop a very clear, person-centred support plan and we used that to secure funding" (care manager).

The uses of the personal budget allocated to Ms X included the purchase of a laptop computer that enabled her to shop online and to be active in social media, reducing her risk of isolation.

Discussion

For all the participants the single most important feature of working with the project social worker was that the focus was on them, not on 'the paperwork'. To varying degrees, participants reported feeling that care managers, notwithstanding the fact that they were "nice people", were under pressures of time and workload, and had a primary duty of compliance with the process of assessing needs and setting budgets as an end in itself. This led to a universal feeling that individuals and families had to be prepared to fight for the things they needed.

Further, participants felt that researching, negotiating and implementing very personalised support, breaking away from more familiar patterns of contracted social care services, demanded knowledge and experience that care managers did not necessarily possess.

The difference it has made for people who use services

- Having access to the skills, specific knowledge, time and professional skills of the project social worker has empowered and equipped some participant families to 'aim high' in their support planning, and to break away from more traditional service delivery.

- Being presented with the responsibility for managing a personal budget to meet agreed qualifying needs had previously been experienced by some participants as daunting, a cause of stress, even threatening. Some commented that there was no 'work manual' to refer to, and the fear of failing in their responsibilities created significant levels of anxiety. Some described themselves as having previously felt very alone and isolated by their new responsibilities.

- When asked to describe the best features of the project for them, participants expressed value for the social work skills brought to bear by the project social worker, and the manner in which she made them available.

- Listening, information gathering, relationship building and negotiating skills were most frequently commented on as having helped individuals and families at times when they were facing major life choices.

- The fact that these skills were made available to families at times that were convenient to them, including evenings and weekends, promoted the widest possible involvement of family members in discussions about needs, options and contributions. This was contrasted with what most participants felt to be a mainly office hours statutory service, with an emphasis after the process of budget setting had been completed on problem-oriented rather than continuous contact.

- Reflecting on their experience of the project, all participants reported feeling encouraged and affirmed in their hopes for more positive futures as a result of personalisation.

- The project social worker's ability to describe personalised support plans successfully implemented by other people she has worked with gave them the courage to decline easy-to-arrange off-the-peg services in favour of more flexible and individual community-based activities and support.

- Most said that they felt more confident to continue support planning in the future, with less reliance on guidance from professionals. There was a unanimous view that projects like this one should become mainstream, and that without the continuing availability of professional help that was separate from the processes of needs assessment and budget setting, some of the expectations for personalised support would be frustrated.

- In explaining the difference between professionals "doing things for us" or "supporting us to do things for ourselves", one participant described her life as being like a complicated jigsaw puzzle. She had a lot of different pieces (accommodation, equipment, support, training, leisure activities etc.) that she needed to be able to fit together if she was to have any chance of achieving the lifestyle that would make her happy. By introducing her to other people who had designed their own support, this user-led project had encouraged her to have the confidence to ask that professionals and organisations respect that the jigsaw of her life was unique, and that what she wanted was help to fit her own chosen pieces together, not to bring pre-cut pieces along and try to force them in.

- A concern that was voiced several times by the parents of young adults with complex support needs was that they would have to act as the long-term, unpaid care manager of their own son or daughter's bespoke support package. In some instances this raised serious worries about their ability to act in this capacity for as long as would be necessary, and about the impact this would have on their own life plans, including education and employment. While they

understood that this project was not designed to explore or resolve this issue, they felt that it was opportune to raise it as a necessary part of fully understanding and sustaining personalisation.

The difference it has made for social work and social workers

- In most cases, the council's care managers welcomed the opportunity to refer clients/customers to an independent service: "We gained a better understanding of the customer's needs and she had a better outcome" (care manager).

- A view was strongly and commonly expressed by participants that help with support planning demanded different timescales and a different relationship with professionals than that which they felt was typically experienced in the 'gatekeeping' (i.e., assessment and budget setting) stages. Some questioned whether social work support was actually part of the care management relationship.

- Some care managers were said to feel that the project social worker was 'sitting in judgement' on them. This was mutually unhelpful to varying degrees (because it could contribute to delays and the duplication of professional effort), and illustrates the importance of robust agreements on roles and accountabilities and communication.

- The relevance of the social work role to individuals and families facing new responsibilities for managing their own budgets and support arrangements was affirmed by the experiences and comments of participating families. There was an outstanding question nationally about whether or not social work support was part of the remit of a care manager.

- Contrasting her work in the project to her previous experience of working in a local authority setting, the project social worker expressed her strong view that the provision of social work help in support planning worked best when it was independent of the processes of needs assessment and budget setting, and that this was a professionally challenging and satisfying role.

Challenges

Where the experience and outcomes of working with the project were not completely successful, this appears to have been due mainly to two factors: differing expectations of the aims of the project and the role of the project social worker.

This was a small-scale project being managed by a well-established and respected user-led organisation with an existing effective communications network. As a result, the target level of engagement was very quickly reached by a combination of word-of-mouth recommendations and referrals from the council. For this reason, a promotional leaflet

to support the marketing of the project was felt to be unnecessary, and indeed possibly undesirable in terms of a risk of generating a level of demand that could not be met. An unintended consequence of this was that participants arrived at their understanding of what the project was offering through verbal exchanges and without reference to any single, clear statement of purpose and process. As a result, some expectations of the project were beyond its actual remit.

Maximum mutual benefit has been achieved where the involvement of the project social worker has been valued by the council as an integral contribution to effective information gathering, decision-making and resource allocation. Where the role and activities of the project social worker have created some ambivalence on the part of the council, this appears to have led to situations where conflict or confrontation have added delay or additional difficulties (for example, in relation to communication and coordination) for a small number of participants: two felt that in practice the project social worker did not have any 'clout' within the system, and therefore could not help them to fully resolve difficulties they faced.

Advocacy

For some participants the expectation had been that the project social worker would act as a strong advocate for their interests and entitlements, where necessary challenging council decisions, while the council's pre-implementation expectation was that the worker's focus would be on support planning and working with participants to explore best possible uses of the allocated personal budget and not involve advocacy. The view of the coordinators has always been that advocacy is integral to the social work role.

This tension was felt most acutely where the initial indicative budget was felt by a participant and the social worker, after exploring potential options and preferences, to be insufficient to meet the full costs of the support plan they had worked on together. This led to some in-depth discussions between the project social worker, the project coordinators and council officers. In some instances a mutually successful resolution was achieved, but in others participants ultimately felt disappointed that their proposed support plan would not be funded.

To date these different perspectives have not been fully discussed or resolved.

Resources available to support the project social worker and the wider project plan

As noted elsewhere in this report, this project was devised and coordinated by two organisations. Both of the organisational leads who coordinated the planning and implementation of the project gave their time in a voluntary capacity and had other concurrent heavy commitments. There was no office-based resource for message taking, information management or administration. As demands for mediation, clarification, attendance at meetings, support for the project social worker and so on increased, it was clear that the project would have benefited from greater (paid) management capacity to also maintain an influence at strategic levels of interagency working and decision-making. This small-scale experiment has highlighted pressures

and risks that can arise when user-led organisations take on complex operational projects without additional resources to underpin their delivery.

National issues

With widespread reports of increasing cuts, including in the workforce, in local authorities it is timely to examine and explore creative partnerships that have the potential to improve effectiveness and achieve efficiencies. This project has illustrated that a user-led organisation can offer a choice of professional support rooted in the values of inclusion and citizenship and good social work practice.

Project participants stated that social work support offered without the constraints of budget setting and workload pressures, and managed under the auspices of a user-led organisation, had been life changing, leaving them better equipped to respond to changing circumstances in the future.

Role of social workers

Peer support is a powerful mechanism for informing and empowering citizens who share a sense of common purpose. It promotes shared learning, independence and self-reliance, but it can neither emerge nor thrive in a vacuum. Investment in developmental capacity and resources for training, communications and networking could significantly increase the ability of user-led organisations to take a lead in expanding peer support opportunities alongside other services.

The experiences reported within the work of this project resonate with the content of an open letter from in Control to Care Services Minister Norman Lamb in support of proposals in the Boyle report. The project coordinators feel that the following extract from the letter reflects their own organisation's insights and affirms the timeliness of this project and its relevance in a national context.

> *'Thankfully research and experience are increasingly showing us what works to really improve outcomes and extend choice and control. The problem is that in too many places these things are not being done. For example, in respect of personal budgets, we too often find unsuitable systems for resource allocation, burdensome support planning approaches not controlled by people themselves, rigid rules on spend, social workers not trusted to make judgements, people left without information advice and advocacy, under-developed markets and restrictive preferred provider lists. There are the places where, in the name of controlling spend, more money is spent, sometimes through unnecessary process, sometimes through not allowing creative use of budgets.' (in Control, 4 March 2013)*

The issue of family members having to act as managers of their relative's personal budget and support package, including employing personal assistants on behalf of the disabled person, was highlighted in the project. Those who do not have family members to support them in this way may find themselves deprived of the choice of a personal budget. Finding ways to support people to manage their personal budget in a way that leaves their choice and control intact is a national issue. There may be a role for user-led organisations here.

Local issues

Some local authority care managers and social workers reported that they found the project helpful and inspiring.

Many individuals benefited directly from the project. In particular there were important examples of creative support planning, such as respite care in a forest lodge, at a fraction of the cost of traditional respite care – a win-win arrangement.

NHS funding for people with continuing healthcare entitlements was highlighted by the project coordinators and the project social worker as an issue requiring concentrated attention if the full benefits of personalisation were to be achieved. The coordinators regretted that, in their judgement, they had lacked sufficient capacity to focus their energies more influentially in this area.

The project social worker made a successful application for continuing healthcare funding on behalf of one of the participants – a funding source that had not been considered by the local authority.

Conclusion and recommendations

Citizenship and peer support

The context of citizenship and inclusion in which the project worked was crucial to the success of the project, as was peer support illustrated above.

Family working

Critical to the achievement of personalised outcomes in this project was a commitment to working with whole families rather than focusing on an individual's support needs in isolation.

Participant families were united in urging that the option of receiving support planning assistance from a social worker not previously involved in budget setting be made more readily available. While this project has been overwhelmingly successful in providing that option, it has also highlighted the importance of robust agreements on roles, expectations and accountabilities being clearly established and communicated prior to the commencement of the service.

Advocacy, rights and entitlements

The question of advocacy is one that requires particular attention. The coordinators, participants and worker in this project were unanimous in their view that advocacy should be at the heart of social work, and an essential and integral part of support planning, especially in relation to the adequacy of indicative budgets to meet agreed needs. Recent statements on the limitations of the Resource Allocation System and pressures on council budgets across the country underline the importance of supporting families to exercise their rights and entitlements without reference to budget constraints.

The major recommendation arising from this project is that social work help with support planning, independent of those professional activities that focus on testing eligibility and setting budgets, should be routinely offered to anyone accepting a personal budget.

My own impression is that the lifetime of this project was too short to provide robust evidence of skills transfer from the worker to participants, but that there are strong signs that this would be achievable over a longer period. This, combined with facilitated group work and peer support, could prove a powerful mechanism for the simultaneous achievement of improved outcomes for citizens and efficiencies in the deployment of professional staff.

The questions it raises are:

1. Should this social work role be integrated into the local authority's care management processes and establishment, in which case, what structural, training and cultural issues would have to be considered, *or*
2. Should it be additional to, and separate from, care management roles, in which case, where might it be located and how might it be funded and managed?

Experience from this project provides a basis for further experimentation, over a longer term, with alternative models of social work resources accessible to personal budget holders.

On a local level, it is clear that the accumulation of first-hand experience of self-directed support within the membership of Lives Unlimited make it a local beacon of achievement and equip it to be a strong contributor to the support planning process in York. Everyone consulted during the evaluation (project coordinators, participant families, council officers and the project social worker) felt that the project demonstrated the value of support provided by a competent non-statutory organisation, and saw benefits to further exploration of its wider long-term applicability, subject to caveats about resources, role clarity and accountability.