

## **Appendix – RBWM Resource Allocation System**

### **Part A - Self Assessment Questionnaire**

This assessment is a way of finding out the amount of support you need to move towards some or all of these national general outcomes:

1. To stay healthy and recover quickly from illness
2. To have the best possible quality of life, including life with other family members supported in a caring role
3. To participate as an active citizen, increasing independence where possible
4. To have maximum choice and control
5. To live safely, free from discrimination or harassment
6. To achieve economic well-being and have access to work and / or benefits as appropriate
7. To keep your personal dignity and be respected by others

The assessment first asks you to consider your current situation and how you need to change it to develop personal outcomes, (personal goals) which will achieve the above.

After that there is just **one part** to the assessment **for you to complete with your unpaid carer.**

**Part 1 – ‘About myself and my needs’ is for you to complete (Pages 3-20)**

Part 2 – ‘About risk relating to care’ is for the Care Manager to complete (Page 21)

Part 3 – ‘About cash budget working and support’ is for the Care Manager to complete (Page 22)

This form should be in a format you can access. If an alternative format is needed tell RBWM Adults Service.

Below is some information on part one of the form:

**Part 1 (pages 3 to 20)– is for you to complete and your unpaid carer**

This part of the form is for you to tell us about your needs. There are a number of questions. The questions are in 11 sections

1. Personal care
2. Keeping Safe
3. Physical, Mental Health & Well-Being
4. Behaviour
5. Eating, Drinking & Nutrition
6. Practical Aspects of Daily Living
7. Choice & Control
8. Communication
9. Keeping in Touch with Friends & Family
10. Work, Leisure, Learning & Travel
11. Caring

You may like some help to complete this assessment or to think about what your needs are. You can ask a family member, friends, carers, health or social worker, occupational therapist, advocate or someone else to help you. You can contact RBWM Adults' Services if you want to talk about getting help to tell us about your needs.

After we have received the completed form we may need to discuss parts of the form with you further.

It is important that you describe **ALL** your needs in Part I, sections 1-11. Please include any already being met by family members or other people who are not paid to care for you. Also include any needs that are being met by paid carers. You may have equipment that helps you to manage daily activities. Tell us how you manage with the help of that equipment.

There is space in each section to tell us what you want to stay the same and what you want to change (personal outcomes). What you want to stay the same might only be possible with the help of equipment. Let us know what this is and how the equipment helps you to be more independent. You can also use this for any other comments.

## **The Process**

- You complete the supported-assessment form in conjunction with a care manager
- We will keep other reports that provide information about your needs, they will be kept with the completed form.
- You will be given the completed supported-assessment form and any attached reports. RBWM Adult Services will keep a copy.
- We will need to ask you about what money you have. This is done through a 'financial assessment'. One of our Welfare Benefits Advisers will complete your financial assessment with you. The financial assessment will be carried out after you have completed and returned the Supported Assessment Form. They will tell you if you need to pay anything towards the cost of the support to meet your social care needs and how much money this will be. The Welfare Benefits Adviser will also give advice about any Benefits you can claim.
- Your care manager or health worker will talk with you about what you want to achieve (personal outcomes). They will also consider the needs of your unpaid carer(s)
- If you are eligible to receive assistance from us, you will be allocated an amount of money which you must use to pay for support to meet your social care needs and to achieve your personal outcomes. You will need to plan carefully how to use this money and we will help you with this if you want us to.

## **DATA PROTECTION ACT**

The information you provide is protected by the Data Protection Act. Strict controls are in place to safeguard such data. Further details are in our leaflet "Protecting your personal information" which can be supplied on request. By giving information and signing this form you agree that the information may be shared with other parts of the Local Authority and other agencies with whom Social Services work so that the appropriate services may be arranged. Information may be sent to you as a result of this assessment.

## PART I. THE SELF-ASSESSMENT FORM

**Surname**

**First Name**

**Date of birth**

**National Insurance Number**

**Gender**

**Ethnicity**

**Address with Postcode**

### Information about myself:

#### Ethnicity

We are asking about your background for a reason. Checks are made to ensure people from different backgrounds have fair access to services. Please cross only one box. Cross the box next to your background description.

Ethnicity					
White	Black	Mixed	Asian	Other	
British	Caribbean	White & Black Caribbean	Indian	Chinese	
Irish	African	White & Black African	Pakistani	Other (detail)	
Other	Black -other	White & Asian	Bangladeshi		
		Mixed – other	Asian-other		

#### Work, Education or Training

Please tell us if you are in work, education or training. Please cross only one box.

Full time work (24 hours or more per week)	
Part time work (24 hours or less per week)	
Government training/New Deal	
Student	
Other structured daytime activity	

#### The type of housing you live in

Please tell us about the type of housing you currently live in. Please cross only one box.

Residential care home	
Private rented accommodation	
Living with family	
Owner occupation	
Living with friends	
Supported housing	
Housing for older people	
Temporary accommodation	
Other – please specify	

#### Current Housing Support Service (funded by Supporting People)

If you have a housing support service, please tell us who provides this service.

#### The organisation providing me with housing support is called:

**If you have been living in the Borough for less than 6 months where did you live before?  
Name of local authority:**

**PAYING SOME MONEY (A FINANCIAL CONTRIBUTION) TOWARDS THE SUPPORT I NEED**

I understand you will ask me about what money I have. This is to find out if I need to pay an amount towards the cost of support to meet my needs. If I have saved more than £23,000<sup>1</sup>, it is likely I will have to use my money to pay for any support I need.

**Please sign below to tell us you understand about possibly needing to pay some money towards the support you need.**

**Sign**

**Date**

**I consent to this information being shared with other departments?  
Yes / No / In part (please provide detail)**

**Further information about myself**

Please tell us anything else you want us to know about yourself and your current situation.

The reason why I contacted you:

What needs to change:

What is working well for me and I would like to continue:

Other things I want you to know about my physical, sensory, mental health and emotional wellbeing:

Other things I want to say about what helps my independence (including community alarm, equipment and adaptations or other services) and how I would like to be more independent:

Does your support need vary from week to week?

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<sup>1</sup> The 2010/11 capital figures are £23,250 for individuals and £46,500 for couples

## SECTION 1. PERSONAL CARE

This section is about looking after yourself - washing, dressing, going to the toilet and toilet hygiene. You may need physical assistance to do these things or just need reminding or encouraging.

<b>A. Personal Care during the day.</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I am <b>able to manage</b> my personal care needs.			
I <b>sometimes</b> need help with my personal care (e.g. twice a week).			
I need assistance <b>once a day</b> with my personal care.			
I need assistance <b>twice a day</b> with my personal care.			
I need assistance <b>three times a day</b> with my personal care. NB this is covered below			
I need assistance <b>more than three times</b> a day with my personal care.			
<b>Personal Care during the day with two people to assist you.</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I need two people to assist me <b>once a day</b> with my personal care			
I need two people to assist me <b>twice a day</b> with my personal care			
I need two people to assist me <b>three times a day or more</b> with my personal care			
<b>B. Personal Care during the night. (After 10pm and before 7am)</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I <b>sometimes</b> need assistance during the night with my personal care for example, twice a week			
I need help <b>once or twice</b> during the night.			
I need help <b>more than twice</b> during the night with my personal care.			
<b>Personal Care during the night with two people to assist you. (After 10pm and before 7am)</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I need two people to assist me <b>once or twice</b> a night with my personal care			
I need two people to assist me <b>more than twice a night</b> with my personal care			
What needs to stay the same?			
What needs to change?			

## SECTION 1. PERSONAL CARE CONTINUED

<b>Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I get <b>no</b> support with my Personal Care from an unpaid informal carer/ support			
I get <b>some</b> of the support I need with my Personal Care from an unpaid informal carer/ support			
I get <b>most</b> of the support I need with my Personal Care from an unpaid informal carer/ support			
I get <b>all</b> of the support I need with my Personal Care from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support- This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.**

<b>Question for the Carer/ Provider of Informal Support</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 2. KEEPING SAFE

This part is about keeping safe, for example when going out on a bus, using a gas cooker, moving from one room to another, or going downstairs - but staying safe is about different things for different people.

Some situations where there is quite high risk can be managed by using technology. If you require support to manage risks you should, find out about what is available e.g. community alarm, equipment, assistive technology

	My view	Worker's view	Final agreement
I <b>don't need</b> any support to stay safe. I'm happy and no-one says they are worried.			
I <b>can</b> keep myself safe at home but I would <b>need</b> someone to check on me <b>occasionally</b> and would <b>need support quickly</b> if something went wrong.			
I <b>sometimes</b> need help to stay safe (to check on me a <b>few times a week</b> ). People worry a bit about my safety.			
I <b>need</b> help <b>most</b> of the time to stay safe. There have been some instances where my safety has been at risk in the home or when I go out and people have been worried about me			
I <b>always need</b> someone with me to make sure I keep safe. There have been a lot of instances where my safety has been at risk in the home or when I go out, and people have been very worried about me.			

**Are there things that someone is doing to you that make you feel anxious or unsafe?** Yes / No

What needs to stay the same?

What needs to change?

## SECTION 2. KEEPING SAFE CONTINUED

<b>Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I get <b>no</b> support to keep me safe from an unpaid informal carer/ support			
I get <b>some</b> of the support I need to keep me safe from an unpaid informal carer/ support			
I get <b>most</b> of the support I need to keep me safe from an unpaid informal carer/ support			
I get <b>all</b> of the support I need to keep me safe from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support- This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.**

<b>Question for the Carer/ Provider of Informal Support</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 3. PHYSICAL, MENTAL HEALTH AND WELL BEING

This part refers to long term physical or mental health conditions for which you have some specialist input (e.g., from a Community Psychiatric Nurse, Macmillan Nurse, Specialist Nurse, e.g. for Diabetes/Parkinson's/MS etc; Speech and Language Therapist, Physiotherapist, Occupational Therapist, Practice Nurse)

	<b>My view</b>		<b>Worker's view</b>		<b>Final agreement</b>	
	Mental Health & Well-Being	Physical Health	MH & WB	PH	MH & WB	PH
I am generally well and <b>do not need help</b> maintaining my health						
I feel unwell, about two or three times a week						
I feel unwell about <b>half the time</b>						
I have complex health needs and feel unwell <b>most of the time</b>						

What needs to stay the same?

What needs to change?



### SECTION 3, PHYSICAL, MENTAL HEALTH AND WELL BEING – Stability

	My view		Worker's view		Final agreement	
	Mental Health & Well-Being	Physical Health	MH & WB	PH	MH & WB	PH
I have <b>no problems</b> with maintaining the stability of my condition						
I <b>need intervention</b> from others to ensure I remain stable.						
It is <b>not possible to stabilise</b> my condition						

What needs to stay the same?

What needs to change?

Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community	My view	Worker's view	Final agreement
I get <b>no</b> support to maintain my physical/mental wellbeing from an unpaid informal carer/ support			
I get <b>some</b> of the support I need to maintain my physical/mental wellbeing from an unpaid informal carer/ support			
I get <b>most</b> of the support I need to maintain my physical/mental wellbeing from an unpaid informal carer/ support			
I get <b>all</b> of the support I need to maintain my physical/mental wellbeing from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support-** This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.

Question for the Carer/ Provider of Informal Support	My view	Worker's view	Final agreement
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 4. BEHAVIOUR

This section is about how situations might affect you in the community and at home. Behaviour can be affected by a number of different factors, for example, illness, injury, substance misuse, stress or anxiety.

	My view	Worker's view	Final agreement
I have <b>never</b> done things that could hurt me or others. I manage my feelings appropriately.			
I <b>Sometimes (at least once a month)</b> do things that could cause distress to others, but what I do is not dangerous or harmful to either myself or others			
I am <b>often 'distressed'</b> and this can cause distress to others. Usually I or others will know why this is and I can be supported.			
I am <b>often 'distressed' or cause distress to others.</b> Often no-one knows why and I can be vulnerable as a result.			
I <b>sometimes</b> do things that could hurt or be dangerous to myself or other. If people support me in the right way, the risk is manageable.			
I <b>often (daily)</b> do things that could hurt or be dangerous to myself or others. My behaviour is unpredictable in some environments and would present a high risk to myself and others.			
I <b>often (daily)</b> do things that could hurt or be dangerous to myself or others. My behaviour is mostly unpredictable and I present a high risk all of the time			
I need <b>one person</b> with me during the <b>night</b> as my behaviour may place myself or others at risk			
I need <b>two people</b> with me during the <b>night</b> as my behaviour may place myself or others at risk.			

What needs to stay the same?

What needs to change?

## SECTION 4. BEHAVIOUR CONTINUED

<b>Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I get <b>no</b> help with my Behaviour from an unpaid informal carer/ support			
I get <b>some</b> of the help I need with my Behaviour from an unpaid informal carer/ support			
I get <b>most</b> of the help I need with my Behaviour from an unpaid informal carer/ support			
I get <b>all</b> of the help I need with my Behaviour from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support- This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.**

<b>Question for the Carer/ Provider of Informal Support</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 5. EATING, DRINKING & NUTRITION

This section is about eating and drinking. It includes preparing and cooking food, making and drinking fluids at regular times, staying fit and well nourished

	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I <b>manage</b> eating, drinking and preparing food myself			
I <b>can manage</b> to prepare snacks and drinks but <b>require assistance</b> with a hot meal each day, e.g. Frozen meals			
I <b>need all</b> my meals/drinks to be provided or prepared for me but I can eat and drink independently			
I <b>need all</b> my meals/drinks to be provided or prepared for me and I <b>need help</b> and/or encouragement and prompting to eat and drink appropriately			
I <b>need all</b> my meals/drinks to be provided or prepared for me. I need support to eat and/or support to drink			

## SECTION 5. EATING, DRINKING & NUTRITION CONTINUED

What needs to stay the same?			
What needs to change?			
<b>Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I get <b>no</b> support with eating, drinking and preparing food from an unpaid informal carer/ support			
I get <b>some</b> of the support I need with eating, drinking and preparing food from an unpaid informal carer/ support			
I get <b>most</b> of the support I need with eating, drinking and preparing food from an unpaid informal carer/ support			
I get <b>all</b> of the support I need with eating, drinking and preparing food from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support- This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.**

<b>Question for the Carer/ Provider of Informal Support</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 6. PRACTICAL ASPECTS OF DAILY LIVING

This section is about practical daily living tasks – shopping, laundry, bed change, cleaning, managing money and correspondence.

	My view	Worker's view	Final agreement
I <b>do not need</b> any help with these daily living activities.			
I can carry out some practical aspects of daily living on my own e.g. shopping, laundry, bed change, cleaning although I need <b>reminding / encouraging</b> .			
I need <b>lots</b> of help to manage aspects of daily living.			
Please tick all the 'my view' boxes that apply	My view	Worker's view	Final agreement
I <b>regularly</b> need help to manage my money.			
I <b>regularly</b> need help with shopping.			
I <b>regularly</b> need help with laundry and / or bed change.			
I <b>regularly</b> need help to clean my home.			
I <b>regularly</b> need help with letters and form filling.			

What needs to stay the same?

What needs to change?

Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community	My view	Worker's view	Final agreement
I get <b>no</b> help with these daily living activities from an unpaid informal carer/ support			
I get <b>some</b> of the help I need with these daily living activities from an unpaid informal carer/ support			
I get <b>most</b> of the help I need with these daily living activities from an unpaid informal carer/ support			
I get <b>all</b> of the help I need with these daily living activities from an unpaid informal carer/ support			

## SECTION 6. PRACTICAL ASPECTS OF DAILY LIVING CONTINUED

**Question for the Carer/ Provider of Informal Support-** This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.

Question for the Carer/ Provider of Informal Support	My view	Worker's view	Final agreement
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 7. CHOICE AND CONTROL

This section is about being able to make choices / decisions about things in your life, for example, where you live, who assists you, what you do and how your money is spent.

	My view	Worker's view	Final agreement
I <b>am able</b> to make my own choices/decisions even though others may not always agree with what they are.			
With <b>some assistance</b> I am able to make all the choices / decisions about my life.			
I am able to <b>make most day-to-day</b> choices and decisions but need assistance to make important decisions about my life.			
<b>Other people</b> make most or all of the choices and decisions about my life. I need assistance to take some control over my life.			

What needs to stay the same?

What needs to change?

Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community	My view	Worker's view	Final agreement
I get <b>no</b> support with choice and control from an unpaid informal carer/ support			
I get <b>some</b> of the support I need with choice and control from an unpaid informal carer/ support			
I get <b>most</b> of the support I need with choice and control from an unpaid informal carer/ support			
I get <b>all</b> of the support I need with choice and control from an unpaid informal carer/ support			

**SECTION 7. CHOICE AND CONTROL CONTINUED**

**Question for the Carer/ Provider of Informal Support-** This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.

Question for the Carer/ Provider of Informal Support	My view	Worker's view	Final agreement
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

**SECTION 8. COMMUNICATION**

This part is about how easy you find it to communicate with other people. You may have difficulty with this because your speech is hard to understand, because you find it hard to hear, or because you use different communication such as sign language. You may find it hard to communicate in some situations, such as where poor light makes it hard to lip read, or where people are not willing to take time to work out the best way to communicate.

Communication means understanding other people and other people being able to understand you. You will find it difficult to communicate if you find it hard to understand other people or if other people find it hard to understand you.

	My view	Worker's view	Final agreement
I <b>am able</b> to communicate and be understood by others.			
I need assistance in <b>some</b> situations to communicate and be understood by others.			
I need assistance <b>most</b> of the time to communicate and be understood by others.			
I need assistance all of the time to communicate and be understood by others			

What needs to stay the same?
What needs to change?

## SECTION 8. COMMUNICATION CONTINUED

<b>Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I get <b>no</b> support with communication from an unpaid informal carer/ support			
I get <b>some</b> of the support I need with communication from an unpaid informal carer/ support			
I get <b>most</b> of the support I need with communication from an unpaid informal carer/ support			
I get <b>all</b> of the support I need with communication from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support- This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.**

<b>Question for the Carer/ Provider of Informal Support</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 9. KEEPING IN TOUCH WITH FRIENDS AND FAMILY

This section is about socialising with other people

	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I <b>am content</b> with things as they are and don't need any assistance.			
I have a few friends and social contacts. I need someone <b>reminding / encouraging me</b> to keep in contact with them.			
I need <b>practical support</b> to keep in contact with my family/friends/social contacts (e.g. transport or someone to come with me).			
I don't have <b>many</b> friends or social contacts. I would like to have more and need <b>practical support</b> with this.			



## SECTION 9. KEEPING IN TOUCH WITH FRIENDS AND FAMILY CONTINUED

What needs to stay the same?			
What needs to change?			
<b>Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I get <b>no</b> support to keep in touch from an unpaid informal carer/ support			
I get <b>some</b> of the support I need to keep in touch from an unpaid informal carer/ support			
I get <b>most</b> of the support I need to keep in touch from an unpaid informal carer/ support			
I get <b>all</b> of the support I need to keep in touch from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support- This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.**

<b>Question for the Carer/ Provider of Informal Support</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

## SECTION 10. WORK, LEARNING, LEISURE & TRAVEL

**Work and Learning:** This part is about having a job, learning new things and enjoying life

	My view	Worker's view	Final agreement
I am busy and enjoy my time. I <b>do not need</b> any support.			
I am busy with a job or learning new things and enjoy my time. I <b>need support</b> to keep these going			
I have a <b>few chances</b> to work, learn new things, and enjoy life. I <b>need support</b> to do these more			
I do <b>not have</b> many chances to work, learn new things, or enjoy life. I <b>need support</b> to do these more			

**Leisure & Recreation:** This section is about participating in your hobbies and interests. This might include visiting clubs and leisure facilities, places of interest and worship.

	My view	Worker's view	Final agreement
I <b>am able</b> to participate in recreational activities of my choice			
I need <b>reminding/encouraging</b> or some assistance to participate in recreational activities of my choice			
I need <b>constant assistance</b> to participate in recreational activities of my choice			
I am <b>unable</b> to access recreational activities but I <b>am happy</b> with this			
I am <b>unable</b> to access recreational activities <b>but would like to</b>			

**Travelling:** This part is about going for a walk, using public transport or being taken out

	My view	Worker's view	Final agreement
I <b>am able</b> to travel outdoors independently <b>without any assistance</b> from another person			
I <b>need</b> support to be able to travel outdoors			

What needs to stay the same?

What needs to change?

## SECTION 10. WORK, LEARNING, LEISURE & TRAVEL CONTINUED

Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community	My view	Worker's view	Final agreement
I get <b>no</b> support with work, learning, leisure and travel from an unpaid informal carer/ support			
I get <b>some</b> of the support I need with work, learning, leisure and travel from an unpaid informal carer/ support			
I get <b>most</b> of the support I need with work, learning, leisure and travel from an unpaid informal carer/ support			
I get <b>all</b> of the support I need with work, learning, leisure and travel from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support-** This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.

Question for the Carer/ Provider of Informal Support	My view	Worker's view	Final agreement
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
YES/NO

## SECTION 11. CARING (if applicable)

Your caring role could be for a child or dependant this is someone you help to care for on a regular basis.

	My view	Worker's view	Final agreement
I do not have children/ dependents?			
I do <b>not need</b> assistance in caring for my children/dependents.			
I need occasional ( <b>once or twice a week</b> ) practical assistance with caring for my children/dependents			
I need occasional ( <b>once or twice a day</b> ) practical assistance with caring for my children/dependents			
I need some ( <b>at least 3 times a day</b> ) practical assistance with caring for my children/dependents			
I need considerable assistance ( <b>at least 5 times a day</b> ) with practical tasks of caring for my children/dependents – including their personal care, preparing meals and ensuring their safety			
I need assistance <b>all</b> the time with practical tasks of caring for my children/dependents – including their personal care, preparing meals and ensuring their safety			

## SECTION 11. CARING (if applicable) CONTINUED

What needs to stay the same?			
What needs to change?			
<b>Informal Support- This part is about the support you already receive and will continue to receive, for example from family/ friends/ neighbours/ others within the community</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I get <b>no</b> support with caring for my dependents from an unpaid informal carer/ support			
I get <b>some</b> of the support I need with caring for my dependents from an unpaid informal carer/ support			
I get <b>most</b> of the support I need with caring for my dependents from an unpaid informal carer/ support			
I get <b>all</b> of the support I need with caring for my dependents from an unpaid informal carer/ support			

**Question for the Carer/ Provider of Informal Support- This part is about how often the unpaid carer/ informal support is able to deliver the level of informal support the service user has told us about.**

<b>Question for the Carer/ Provider of Informal Support</b>	<b>My view</b>	<b>Worker's view</b>	<b>Final agreement</b>
I can provide support for <b>less than 48 weeks</b> of the year			
I can provide support for <b>48 to 51 weeks</b> of the year			
I can provide support for <b>52 weeks</b> of the year			

Can you continue with the level and frequency of support you have been stated as giving  
**YES/NO**

**SECTION 12 - CARE MANAGER USE ONLY**

What are the areas of identified risk, regarding risks relating to care?

What is the mitigating action necessary?

### SECTION 13 - Risk of cash budget not working

Questions for the Care Manager	Workers View
This Person <b>does not have the ability to get a bank account/</b> or there is a <b>high risk of mismanagement</b>	
This person has <b>little or no understanding or acceptance of responsibilities</b> , but can express a preference but <b>needs substantial support to make decisions.</b>	
This person has a <b>basic understanding and acceptance of responsibilities but needs significant support to make decisions</b> and may not ask for assistance without prompting	
This person has <b>reasonable understanding and acceptance of responsibilities</b> and makes decisions with little support and asks for assistance when necessary	
<b>This person has good understanding and acceptance of responsibilities and makes decisions autonomously and asks for assistance when necessary</b>	

### SECTION 14 - Support the person has in place

Questions for the Care Manager	Workers View
This person has <b>no support</b> available	
This person has <b>very limited or intermittent support</b> available from family friends	
This person relies on <b>one or two friends and family</b> for support	
This person has <b>a network of friends and family</b> that provide a wide range of support.	
This person has a <b>formal support system</b> and wide network of family and friends	

## Appendix – RBWM Resource Allocation System

### Part B – Points Allocation Methodology

<b>SECTION 1. PERSONAL CARE</b>	
<b>A. Personal Care during the day.</b>	
I am <b>able to manage</b> my personal care needs.	0
I <b>sometimes</b> need help with my personal care (e.g. twice a week).	3
I need assistance <b>once a day</b> with my personal care.	6
I need assistance <b>twice a day</b> with my personal care.	9
I need assistance <b>three times a day</b> with my personal care. NB this is covered below	12
I need assistance <b>more than three times</b> a day with my personal care.	15
<b>Personal Care during the day with two people to assist you.</b>	
I need two people to assist me <b>once a day</b> with my personal care	15
I need two people to assist me <b>twice a day</b> with my personal care	20
I need two people to assist me <b>three times a day or more</b> with my personal care	25
<b>B. Personal Care during the night. (After 10pm and before 7am)</b>	
I <b>sometimes</b> need assistance during the night with my personal care for example, twice a week	1
I need help <b>once or twice</b> during the night.	2
I need help <b>more than twice</b> during the night with my personal care.	3
<b>SECTION 2. KEEPING SAFE</b>	
I <b>don't need</b> any support to stay safe. I'm happy and no-one says they are worried.	0
I <b>can</b> keep myself safe at home but I would <b>need</b> someone to check on me <b>occasionally</b> and would <b>need support quickly</b> if something went wrong.	5
I <b>sometimes</b> need help to stay safe (to check on me a <b>few times a week</b> ). People worry a bit about my safety.	10
I <b>need</b> help <b>most</b> of the time to stay safe. There have been some instances where my safety has been at risk in the home or when I go out and people have been worried about me	15
I <b>always need</b> someone with me to make sure I keep safe. There have been a lot of instances where my safety has been at risk in the home or when I go out, and people have been very worried about me.	20
<b>SECTION 3. PHYSICAL, MENTAL HEALTH AND WELL BEING</b>	
I am generally well and have do not need help maintaining my health	0
I feel unwell, about two or three times a week	2
I feel unwell about <b>half the time</b>	5
I have complex health needs and feel unwell most of the time	10

<b>PHYSICAL, MENTAL HEALTH AND WELL BEING - Stability</b>	
I have <b>no problems</b> with maintaining the stability of my condition	0
I need intervention from others to ensure I remain stable	4
It is not possible to stabilise my condition	8
<b>Section 4. Behaviour</b>	
I have <b>never</b> done things that could hurt me or others. I manage my feelings appropriately.	0
I <b>Sometimes (at least once a month)</b> do things that could cause distress to others, but what I do is not dangerous or harmful to either myself or others	5
I am <b>often 'distressed'</b> and this can cause distress to others. Usually I or others will know why this is and I can be supported.	10
I am <b>often 'distressed' or cause distress to others.</b> Often no-one knows why and I can be vulnerable as a result.	15
I <b>sometimes</b> do things that could hurt or be dangerous to myself or other. If people support me in the right way, the risk is manageable.	20
I <b>often (daily)</b> do things that could hurt or be dangerous to myself or others. My behaviour is unpredictable in some environments and would present a high risk to myself and others.	25
I <b>often (daily)</b> do things that could hurt or be dangerous to myself or others. My behaviour is mostly unpredictable and I present a high risk all of the time	30
<b>SECTION 5. EATING, DRINKING &amp; NUTRITION</b>	
I <b>manage</b> eating, drinking and preparing food myself	0
I <b>can manage</b> to prepare snacks and drinks but <b>require assistance</b> with a hot meal each day, e.g. Frozen meals	2
I <b>need all</b> my meals/drinks to be provided or prepared for me but I can eat and drink independently	4
I <b>need all</b> my meals/drinks to be provided or prepared for me. I <b>need help</b> , encouragement and prompting to eat and drink enough to stay well	6
I <b>need all</b> my meals/drinks to be provided or prepared for me. I need support to eat and support to drink	8
<b>SECTION 6. PRACTICAL ASPECTS OF DAILY LIVING</b>	
I <b>do not</b> need any help with these daily living activities.	0
I can carry out some practical aspects of daily living on my own e.g. shopping, laundry, bed change, cleaning although I need <b>reminding / encouraging</b> .	2
I need <b>lots</b> of help to manage aspects of daily living.	4
Please tick all the 'my view' boxes that apply	
I <b>regularly</b> need help to manage my money.	1
I <b>regularly</b> need help with shopping.	3
I <b>regularly</b> need help with laundry and / or bed change.	3
I <b>regularly</b> need help to clean my home.	1
I <b>regularly</b> need help with letters and form filling.	1
<b>SECTION 7. CHOICE AND CONTROL</b>	
I <b>am able</b> to make my own choices/decisions even though others may not always agree with what they are.	0
With <b>some assistance</b> I am able to make all the choices / decisions about my life.	2
I am able to <b>make most day-to-day</b> choices and decisions but need assistance to make important decisions about my life.	4
<b>Other people</b> make most or all of the choices and decisions about my life. I need assistance to take some control over my life.	6
<b>SECTION 8. COMMUNICATION</b>	
I <b>am able</b> to communicate and be understood by others.	0
I need <b>assistance in some situations to communicate</b> and be understood by others.	2
I need assistance most of the time to communicate and be understood by others.	4
I need assistance all of the time to communicate and be understood by others	6



<b>SECTION 9. KEEPING IN TOUCH WITH FRIENDS AND FAMILY</b>	
I am content with things as they are and don't need any assistance.	0
I have a few friends and social contacts. I need someone <b>reminding / encouraging me</b> to keep in contact with them.	2
I need <b>practical support</b> to keep in contact with my family/friends/social contacts (e.g. transport or someone to come with me).	4
I don't have <b>many</b> friends or social contacts. I would like to have more and need <b>practical support</b> with this.	6
<b>Section 10. WORK, LEARNING, LEISURE &amp; TRAVEL</b>	
<b>Work and Learning</b>	
I am busy and enjoy my time. I <b>do not need</b> any support.	0
I am busy with a job or learning new things and enjoy my time. I <b>need support</b> to keep these going	2
I have a <b>few chances</b> to work, learn new things, and enjoy life. I <b>need support</b> to do these more	4
I <b>do not have</b> many chances to work, learn new things, or enjoy life. I <b>need support</b> to do these more	6
<b>Leisure</b>	
I am able to participate in recreational activities of my choice	0
I need reminding/encouraging or some assistance to participate in recreational activities of my choice	2
I need constant assistance to participate in recreational activities of my choice	4
I am unable to access recreational activities but I am happy with this	6
I am unable to access recreational activities but would like to	8
<b>Travelling:</b> This part is about going for a walk, using public transport or being taken out	
I <b>am able</b> to travel outdoors independently <b>without any assistance</b> from another person	0
I <b>need</b> support to be able to travel outdoors	2
<b>SECTION 11. CARING (if applicable)</b>	
I do not have children/ dependents?	0
I do <b>not need</b> assistance in caring for my children/dependents.	0
I need occasional ( <b>once or twice a week</b> ) practical assistance with caring for my children/dependents	20
I need occasional ( <b>once or twice a day</b> ) practical assistance with caring for my children/dependents	40
I need some ( <b>at least 3 times a day</b> ) practical assistance with caring for my children/dependents	60
I need considerable assistance ( <b>at least 5 times a day</b> ) with practical tasks of caring for my children/dependents – including their personal care, preparing meals and ensuring their safety	80
I need assistance <b>all</b> the time with practical tasks of caring for my children/dependents – including their personal care, preparing meals and ensuring their safety	100

Deduction from Gross cost of care to Net cost of care (this relates to the usual weekly levels of informal care received):

I get <b>no</b> support from an unpaid carer	0%
I get <b>some</b> of the support I need from an unpaid carer	40%
I get <b>most</b> of the support I need from an unpaid carer	60%
I get <b>all</b> of the support I need from an unpaid carer	100%

Question to the Informal carer (this is an add back to the Net cost of care based on the proportion of the year the informal carer will not be able to provide the usual level of support):

I can continue to provide support <b>some</b> of the time	40%
I can continue to provide support <b>most</b> of the time	30%
I can continue to provide support <b>all</b> of the time	0%

## Appendix – RBWM Resource Allocation System

### Part C – Points Allocation Methodology – Learning Disability

	<b>Point Score</b>
<b>SECTION 1. PERSONAL CARE</b>	
<b>A. Personal Care during the day.</b>	
I am <b>able to manage</b> my personal care needs.	0
I <b>sometimes</b> need help with my personal care (e.g. twice a week).	5
I need assistance <b>once a day</b> with my personal care.	10
I need assistance <b>twice a day</b> with my personal care.	15
I need assistance <b>three times a day</b> with my personal care. NB this is covered below	20
I need assistance <b>more than three times</b> a day with my personal care.	25
<b>Personal Care during the day with two people to assist you.</b>	
I need two people to assist me <b>once a day</b> with my personal care	5
I need two people to assist me <b>twice a day</b> with my personal care	10
I need two people to assist me <b>three times a day or more</b> with my personal care	15
<b>B. Personal Care during the night. (After 10pm and before 7am)</b>	
I <b>sometimes</b> need assistance during the night with my personal care for example, twice a week	8
I need help <b>once or twice</b> during the night.	16
I need help <b>more than twice</b> during the night with my personal care.	24

<b>SECTION 2. KEEPING SAFE</b>	
I <b>don't need</b> any support to stay safe. I'm happy and no-one says they are worried.	0
I <b>can</b> keep myself safe at home but I would <b>need</b> someone to check on me <b>occasionally</b> and would <b>need support quickly</b> if something went wrong.	10
I <b>sometimes</b> need help to stay safe (to check on me a <b>few times a week</b> ). People worry a bit about my safety.	20
I <b>need</b> help <b>most</b> of the time to stay safe. There have been some instances where my safety has been at risk in the home or when I go out and people have been worried about me	30
I <b>always need</b> someone with me to make sure I keep safe. There have been a lot of instances where my safety has been at risk in the home or when I go out, and people have been very worried about me.	40
<b>SECTION 3. PHYSICAL, MENTAL HEALTH AND WELL BEING</b>	
I am generally well and have do not need help maintaining my health	0
I feel unwell, about two or three times a week	5
I feel unwell about <b>half the time</b>	10
I have complex health needs and feel unwell most of the time	15
<b>PHYSICAL, MENTAL HEALTH AND WELL BEING - Stability</b>	
I have <b>no problems</b> with maintaining the stability of my condition	0
I need intervention from others to ensure I remain stable	10
It is not possible to stabilise my condition	20
<b>Section 4. Behaviour</b>	
I have <b>never</b> done things that could hurt me or others. I manage my feelings appropriately.	0
I <b>Sometimes (at least once a month)</b> do things that could cause distress to others, but what I do is not dangerous or harmful to either myself or others	10
I am <b>often 'distressed'</b> and this can cause distress to others. Usually I or others will know why this is and I can be supported.	20
I am <b>often 'distressed' or cause distress to others.</b> Often no-one knows why and I can be vulnerable as a result.	30
I <b>sometimes</b> do things that could hurt or be dangerous to myself or other. If people support me in the right way, the risk is manageable.	40
I <b>often (daily)</b> do things that could hurt or be dangerous to myself or others. My behaviour is unpredictable in some environments and would present a high risk to myself and others.	50
I <b>often (daily)</b> do things that could hurt or be dangerous to myself or others. My behaviour is mostly unpredictable and I present a high risk all of the time	60
<b>SECTION 5. EATING, DRINKING &amp; NUTRITION</b>	
I <b>manage</b> eating, drinking and preparing food myself	0
I <b>can manage</b> to prepare snacks and drinks but <b>require assistance</b> with a hot meal each day, e.g. Frozen meals	5
I <b>need all</b> my meals/drinks to be provided or prepared for me but I can eat and drink independently	10
I <b>need all</b> my meals/drinks to be provided or prepared for me. I <b>need help,</b> encouragement and prompting to eat and drink enough to stay well	15
I <b>need all</b> my meals/drinks to be provided or prepared for me. I need support to eat and support to drink	20

<b>SECTION 6. PRACTICAL ASPECTS OF DAILY LIVING</b>	
I <b>do not</b> need any help with these daily living activities.	0
I can carry out some practical aspects of daily living on my own e.g. shopping, laundry, bed change, cleaning although I need <b>reminding / encouraging</b> .	2
I need <b>lots</b> of help to manage aspects of daily living.	16
Please tick all the 'my view' boxes that apply	
I <b>regularly</b> need help to manage my money.	4
I <b>regularly</b> need help with shopping.	4
I <b>regularly</b> need help with laundry and / or bed change.	4
I <b>regularly</b> need help to clean my home.	2
I <b>regularly</b> need help with letters and form filling.	2
<b>SECTION 7. CHOICE AND CONTROL</b>	
I <b>am able</b> to make my own choices/decisions even though others may not always agree with what they are.	0
With <b>some assistance</b> I am able to make all the choices / decisions about my life.	10
I am able to <b>make most day-to-day</b> choices and decisions but need assistance to make important decisions about my life.	20
<b>Other people</b> make most or all of the choices and decisions about my life. I need assistance to take some control over my life.	30
<b>SECTION 8. COMMUNICATION</b>	
I <b>am able</b> to communicate and be understood by others.	0
I need <b>assistance in some situations to communicate</b> and be understood by others.	3
I need assistance most of the time to communicate and be understood by others.	6
I need assistance all of the time to communicate and be understood by others	9
<b>SECTION 9. KEEPING IN TOUCH WITH FRIENDS AND FAMILY</b>	
I am content with things as they are and don't need any assistance.	0
I have a few friends and social contacts. I need someone <b>reminding / encouraging me</b> to keep in contact with them.	2
I need <b>practical support</b> to keep in contact with my family/friends/social contacts (e.g. transport or someone to come with me).	4
I don't have <b>many</b> friends or social contacts. I would like to have more and need <b>practical support</b> with this.	6
<b>Section 10. WORK, LEARNING, LEISURE &amp; TRAVEL</b>	
<b>Work and Learning</b>	
I am busy and enjoy my time. I <b>do not need</b> any support.	0
I am busy with a job or learning new things and enjoy my time. I <b>need support</b> to keep these going	2
I have a <b>few chances</b> to work, learn new things, and enjoy life. I <b>need support</b> to do these more	4
I <b>do not have</b> many chances to work, learn new things, or enjoy life. I <b>need support</b> to do these more	6
<b>Leisure</b>	
I am able to participate in recreational activities of my choice	0
I need reminding/encouraging or some assistance to participate in recreational activities of my choice	2
I need constant assistance to participate in recreational activities of my choice	4
I am unable to access recreational activities but I am happy with this	6
I am unable to access recreational activities but would like to	8

<b>Travelling:</b> This part is about going for a walk, using public transport or being taken out	
I <b>am able</b> to travel outdoors independently <b>without any assistance</b> from another person	0
I <b>need</b> support to be able to travel outdoors	5
<b>SECTION 11. CARING (if applicable)</b>	
I do not have children/ dependents?	0
I do <b>not need</b> assistance in caring for my children/dependents.	0
I need occasional ( <b>once or twice a week</b> ) practical assistance with caring for my children/dependents	20
I need occasional ( <b>once or twice a day</b> ) practical assistance with caring for my children/dependents	40
I need some ( <b>at least 3 times a day</b> ) practical assistance with caring for my children/dependents	60
I need considerable assistance ( <b>at least 5 times a day</b> ) with practical tasks of caring for my children/dependents – including their personal care, preparing meals and ensuring their safety	80
I need assistance <b>all</b> the time with practical tasks of caring for my children/dependents – including their personal care, preparing meals and ensuring their safety	100

Deduction from Gross cost of care to Net cost of care (this relates to the usual weekly levels of informal care received):

I get <b>no</b> support from an unpaid carer	0%
I get <b>some</b> of the support I need from an unpaid carer	40%
I get <b>most</b> of the support I need from an unpaid carer	60%
I get <b>all</b> of the support I need from an unpaid carer	100%

Net Score= Gross Score x (1- percentage deduction)

Question to the Informal carer (this is an add back to the Net cost of care based on the proportion of the year the informal carer will not be able to provide the usual level of support):

I can continue to provide support for <b>less than 48 weeks</b> per year	40%
I can continue to provide support for <b>48 to 51 weeks</b> per year	30%
I can continue to provide support for <b>52 weeks</b> per year	0%

Carer's Break Score= (Gross Score- Net Score) x percentage add back

### Appendix - Part D- Conversion of SAQ Score to Need Level

