



# THE NATIONAL PERSONAL BUDGET SURVEY – Summary of Main Findings

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This paper provides a brief overview of the findings of the POET (Personal Budgets Outcomes Evaluation Tool) surveys. For the detail please see the full report available on [www.thinklocalactpersonal.org.uk](http://www.thinklocalactpersonal.org.uk) and [www.in-control.org.uk](http://www.in-control.org.uk)

Over 2000 personal budget holders and carers completed the POET surveys undertaken for the Think Local Act Personal (TLAP) partnership by In Control and Lancaster University, making this the biggest survey undertaken in England to date. The Think Local, Act Personal Partnership wanted to find out about the outcomes and experiences of people using personal budgets –and their family carers in order to identify the positives to build on and the improvements needed.

The survey provides a detailed and rich picture of outcomes and experiences of people using personal budgets in adult social care - as reported by people themselves. As well as answering specific outcome questions people had the chance to give their personal views about their experiences of personal budget and the impact of personal budgets on their lives.

The POET surveys for personal budget holders and their carers have been developed over several years as a way for personal budget holders and carers to report their experiences of PBs. Ten local authorities in England volunteered to be demonstrator sites and each attempted to gain 100 responses from personal budget holders and carers.

The POET surveys were also widely publicised throughout England for any personal budget holder or carer to complete online. All local authorities who supported the work and all personal budget holders and carers who provided us with information did so on the basis of anonymity, hence the demonstrator sites are not named in the report.

In total, 1,114 personal budget holders completed the POET survey, including 832 returns from the 10 local authority demonstrator sites and returns from at least 76 other local authorities. In total, 950 carers completed the POET survey, including 782 returns from carers in the 10 local authority demonstrator sites and returns from at least 66 other local authorities. Nearly half of the personal budget holders were over 65 years old.

## Findings

Overall, significant majorities of personal budget holders reported positive experiences of the impact of personal budgets on their lives, but experiences of the personal budget process were in many cases deemed unsatisfactory.

In summary, the report finds:

*“..it seems that personal budgets are likely to have generally positive impacts on the lives of all groups of personal budget holders and the people who care for them. The likelihood of people experiencing a positive impact from a personal budget is maximised by a personal budget support process that keeps people fully informed, puts people in control of the personal budget and how it is spent, supports people without undue constraint and bureaucracy, and fully involves carers. Under these conditions, personal budgets can and do work well for everyone”.*

## Headlines for personal budget holders

- Most personal budget holders reported that the main components of self-directed support were in place, including being told the amount of their personal budget, getting help to plan and having their views included in the support plan.
- Most personal budget holders reported personal budgets having a positive impact on most aspects of their lives surveyed including: being supported with dignity and respect; staying as independent as they want to be; being in control of their support; and getting the support they need when they need it. In the other aspects of people's lives asked about, most personal budget holders reported no impact rather than a negative impact. Overall, only very small numbers of people reported personal budgets having a negative impact on any of the aspects of people's lives asked about in the survey.
- In written comments for the POET survey, people were generally very positive about the impact of personal budgets on their lives, although there were clear concerns about money.

## Headlines for Carers

Most carers of personal budget holders also reported positive experiences (to a lesser extent than personal budget holders):

- Most reported that their views were well included in the personal budget holder's support plan.
- Most reported a positive impact of the personal budgets on three key aspects of their own lives as carers: support for them to continue caring; their quality of life; and their physical and mental wellbeing.
- For the other areas asked about, carers were evenly split on whether personal budgets for the person they care for had had a positive impact or made no difference. Most reported no impact on their own capacity to get and keep a paid job.
- Only small minorities of carers reported any areas of their lives getting worse.
- In written comments for the POET survey, carers were highly positive about the impact of personal budgets on the lives of the personal budget holder, themselves as carers and other family members.

## Different experiences

- The survey revealed markedly different outcomes across councils.
- Different ways of managing and supporting personal budgets had a significant impact on the success of personal budgets.
  - Those managing the budget themselves as a direct payment reported significantly more positive outcomes than people receiving council managed budgets.

- People who did not know how their personal budget was managed or did not know the amount of their personal budget reported less positive outcomes (older people were less likely to know).
  - People who felt their views were more fully included in the support plan were more likely to report positive outcomes across the board.
  - People who had been using their personal budgets for longer reported increasingly positive outcomes.
  - A greater weekly amount of personal budget support was associated with more positive outcomes.
- Though all groups reported positive outcomes, those for younger adults (up to 65 years old) were more positive than older adults and their carers. These were differences of degree, with very few people of any age reporting negative outcomes. Older people with direct payments reported more positive outcomes than those with managed personal budgets.

## Process and experience

POET showed personal budget holders varied widely in their experiences of the personal budget process, but many reported difficulties. Comments from carers were also often negative about all aspects of the personal budget process.

The biggest concerns were:

- It not being easy to: get information and advice, get needs assessed, understand what a personal budget could be spent on, be in control of what the budget was spent on, and plan and manage the person's support.

- Overall, less than half felt that the council had made it easy or very easy for people to change their support, choose the best option from a range of services, or voice their opinions or complain.
- Overall, substantial numbers of people (between 13% and 24%) reported that councils had made it difficult or very difficult in each aspect of the personal budgets process.

Again, however, there was substantial variation across councils in perceptions of how easy or difficult councils had made all aspects of the personal budget process.

## Conclusions

The POET survey tells us that the great majority of people see themselves benefitting significantly through having a personal budget and that this applies to all groups of personal budget holders and carers, though there remain some differences across groups.

There are big differences across councils, suggesting some are achieving greater progress on achieving greater choice and control and improving people's chosen outcomes. These positive benefits are being achieved despite processes and restrictions that people are finding frustrating and stressful and which are likely to add to costs. Again the picture seems to vary significantly across councils. Those taking their personal budget as a direct payment were achieving better outcomes than those with a council-managed personal budget, including older people. Where people are using a council-managed personal budget there is clearly work to be done to make sure these offer real choice and control and improve outcomes.