



# Individualised Funding

Lifewise Health & Disability Service 2023

**LIFEWISE**

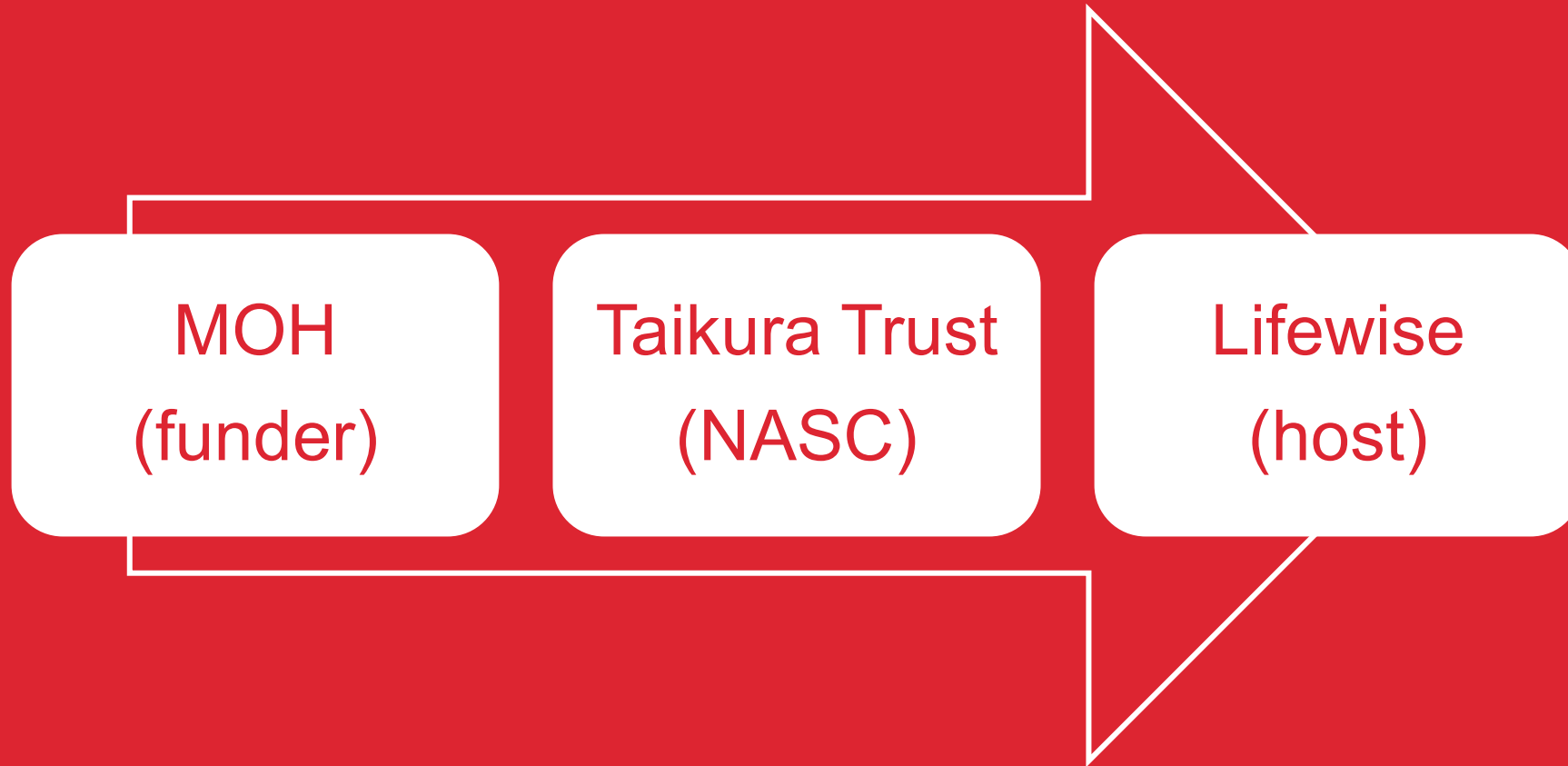


## What is Individualised Funding (IF)?

- A personal budget
- Choice
- Control
- Flexibility

IF can be really **simple** and **easy** to use with the right host

# Who is involved





# Getting started with IF

- Self-refer to Taikura Trust (online or phone)
- Or, ask GP to do a referral for you
- Provide evidence of your child's disability
- Needs assessment by Taikura Trust
- Choose a host to help support you e.g. Lifewise
- Taikura Trust sends Lifewise the paperwork to get started
- Lifewise visits you to get you started



# Types of IF support

Personal Care (PC)

Household Management (HM)

Respite Care (RC)

# Personal Care (PC)

- Bathing/showering
- Dressing/undressing
- Shaving
- Washing/brushing hair
- Brushing teeth
- Toileting
- Feeding/eating
- Exercise
- Medication







# Household Management (HM)

- Meal preparation
- Laundry
- Housework
- Shopping
- Medical/hospital appointments

NOT outside tasks

# Respite Care (RC) – having a break

- Activities in the community e.g. movies, bowling, horse riding, swimming, holiday programme, MOTAT, gymnastics, therapy
- Support Worker can come to person's house and care for them while carer goes out or does other things
- Support Worker can take the person out without carer
- Person can stay at someone's house overnight or during day
- Person can go to a respite facility







# Flexible spending

You may be able to purchase 'things' using your IF budget, if:

- a. It is a disability support
- b. It makes the person's life better or improves it in some way
- c. It is cost effective and reasonable
- d. It is not subject to an exclusion
- e. It fits within your budget

**Always** check with your IF host before making a purchase.

# Make a plan

- Set **goals**
- Make a **plan** of how you will use the support
- Have a **back-up plan** if workers are away
- The plan is a guide for Support Workers
- It is the written proof of how you are using the funding







# Work out a budget

**Lifewise** helps you to set a budget based on:

- Amount of money you have
- How much you pay someone per hour
- Your needs

You can use IF daily, weekly, only at weekends, monthly, or only in the school holidays, or when needed.



# IF Employment

You choose:

- If you employ **individual support workers**, or
- If you contract an **agency**, or
- If you contract a **self-employed person**, or
- If you use **activities** in the community (RC)

You can do a combination of the above





# Who can you employ?

## CAN:

- Family member\*
- Neighbour
- Friend
- Support Worker
- Agency
- Community activity

\*N.B. family living in the same house as the disabled person can be employed; please discuss this with us if it might be relevant for you

## CAN'T:

- Someone who is not legally able to work in NZ
- The disabled person's agent\*

\* in most circumstances (discuss with us first)

# IF Employment – with host support

If you employ or contract someone:

- Have a signed employment agreement
- Pay minimum legal hourly rates
- Keep records of the time worked
- Keep leave records
- Ensure tax, ACC levy and Kiwisaver are paid
- Manage health and safety issues
- Be fair and reasonable







# IF Payments

You decide:

- If you manage payroll, or
- If Lifewise manages this for you (for a small fee from your IF budget - \$120 a year per employee)

You submit:

- Timesheets, or
- Invoices, or
- Expense Claims

# Useful Links

[www.lifewise.org.nz](http://www.lifewise.org.nz) – IF Host agency

[www.taikura.org.nz](http://www.taikura.org.nz) – NASC or 0800 824 5872

[www.whaikaha.govt.nz](http://www.whaikaha.govt.nz) – Whaikaha Ministry of Disabled People

[www.disabilityconnect.org.nz](http://www.disabilityconnect.org.nz) – disability-related advice and information

<https://firstport.co.nz> – disability-related advice and information

# Lifewise Health and Disability contacts

- **Natalie Claxton**, Disability Team Leader - 021 281 6422 or [nataliec@lifewise.org.nz](mailto:nataliec@lifewise.org.nz)
- **Makasini Tulimaiau**, Disability Outcomes Coach – Pasifika Liaison - 021 247 3568 or [makasinit@lifewise.org.nz](mailto:makasinit@lifewise.org.nz)
- **Michelle Jones**, Disability Outcomes Coach – 021 915 526 or [michellej@lifewise.org.nz](mailto:michellej@lifewise.org.nz)
- **Karen Plimmer**, Disability Outcomes Coach - 021 362 986 or [karenp@lifewise.org.nz](mailto:karenp@lifewise.org.nz)
- **Moana Joensen**, Disability Outcomes Coach - 027 534 4409 or [moanaj@lifewise.org.nz](mailto:moanaj@lifewise.org.nz)
- **Faza Azharashid**, Disability Outcomes Coach - 021 790 251 or [fazaa@lifewise.org.nz](mailto:fazaa@lifewise.org.nz)
- **Salma Sidat**, Disability Administration Assistant - 09 623 7631 or [salmad@lifewise.org.nz](mailto:salmad@lifewise.org.nz)
- **Health and Disability Office**, 227 Mount Eden Road, Mt Eden or 09 623 7631