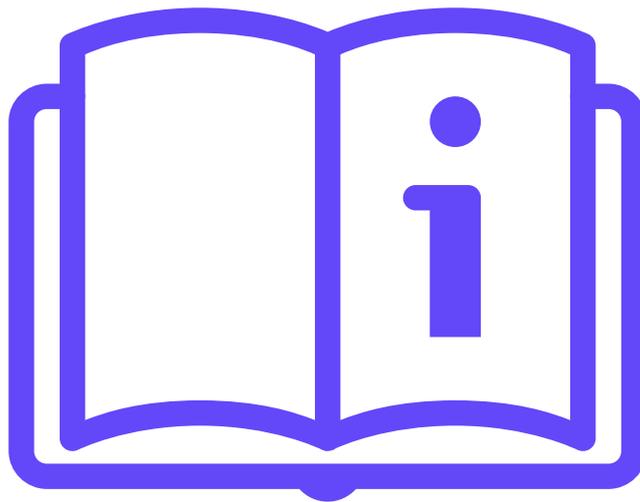




enable communities

Self-Directed Support

**An information and advice
guide for families in Scotland.**



Self-Directed Support: **An information and advice guide for families in Scotland.**

Self-Directed Support (SDS) is Scotland’s approach to arranging social care that puts you in control.

This guide explains how SDS works for both children and adults and gives you the tools to access and manage support with confidence.

Whether you’re an adult with a learning disability, a parent or carer of a child who needs support or an unpaid carer for an adult, this guide will help you take charge of SDS.

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1. What is Self-Directed Support?

Self-Directed Support (SDS) is the way social care is delivered in Scotland, giving people choice and control over the support they receive. Instead of the council simply assigning services, SDS lets you and your family plan and direct how support is provided. In simple terms, SDS means you get a say in your care. It's based on the Social Care (Self-directed Support) (Scotland) Act 2013, a law that requires councils to offer people more control with four flexible options for arranging support.

SDS is available to children, adults, and unpaid carers – anyone in Scotland who is assessed as needing social care services. It covers children and young people (including those moving to adulthood) as well as older adults and carers.

By law, local authorities must treat you with dignity and respect, involve you in decisions, and offer you four choices for how your support is arranged. (We explain the four SDS options in Section 5 below.)

With SDS, you can arrange some or all your support instead of just accepting services the council arranges. This can lead to more flexibility to suit your family's life. For example, you might use a budget to hire a Personal Assistant who can help at times that fit your schedule, rather than fixed support worker visits.

SDS is not a welfare benefit and it won't affect any benefits you receive. It is a fund for your care needs. The council allocates money to pay for the support you or your child require day-to-day. They will let you know what the budget is and what it can be used for based on the support plan you agree on. You'll then have control to spend that budget on approved support that meets your needs.

2. How can I access SDS?

Accessing SDS involves getting an assessment of your needs from your local authority and then choosing how you want your support arranged.

Here is a step-by-step guide:

1. Identify the Need for Support: If you or your loved one have difficulties with daily life due to disability, long-term illness, mental health, or other care needs, you may benefit from social care support. This could include help with personal care, getting out and about, respite breaks, etc. Make a list of areas where support is needed – these are your “needs” or the things that are hard to manage without help.

2. Contact the Local Authority to Request an Assessment: Get in touch with your local council’s social work department and ask for a care needs assessment. For a child this may be called a Children’s Services assessment, for an adult an Adult Community Care assessment. You have the right to request an assessment of your needs. Section 4 of this guide has tips on how to ask, including a template letter. When you contact them, be clear that you are seeking support and mention that you are interested in Self-Directed Support. It is important to mention the urgency of your need for support. Often there are waiting lists for assessments and the assessment is the first step to access SDS.

3. Undergo an Assessment: A social worker or care assessor will meet with you to discuss your situation. They will ask about what you or the person you care for can and cannot do without help, and what outcomes (goals) you want to achieve. For example, an outcome for a child might be “join in after-school activities,” or for an adult “live safely at home.” The assessment looks at what support is needed to meet these outcomes. Be honest and thorough. You want to get across what the care needs are on a really bad day, not an average or good day. This is the time to explain all the areas where support is required. It may help to keep a diary for a week or two before the assessment, noting daily tasks you struggle with, to show the social worker. The assessor will also consider your carer’s needs if you are an unpaid carer. During the process of assessment you are entitled to have a representative or advocate to support you.

4. Eligibility Decision: After the assessment, the local authority will decide if you are eligible for support. Each council has its own eligibility criteria to decide who qualifies. Typically, they look at how severe or critical your needs are. Don’t be discouraged – many people do qualify, including children with significant additional needs and adults who need help with daily living. If your needs meet the criteria, you are entitled to support through SDS. If not, the council should explain why and may direct you to other sources of help in the community. You can also ask for a reassessment if circumstances change.

2. How can I access SDS?

5. Receive an SDS Offer and Budget: If you are eligible, the council will work out an indicative budget – an estimate of how much money is available to meet your assessed needs. They must offer you the four SDS options for how this support is delivered. You should receive information about these options (see Section 5 for details) so you can make an informed choice. This offer and budget discussion is often done in a meeting or via a support plan draft.

6. Support Planning: Once you know your budget and choose a preferred SDS option, you, often with the social worker's help, will create a support plan. This is sometimes called a Personal Outcome Plan or just a care plan. The plan lists your outcomes and how you will use the budget to achieve them.

- Step-by-step: think about what services or assistance will meet your needs. For instance, will you hire a Personal Assistant, purchase services from an agency, or use community programs?
- The support plan will detail these and the costs. Don't worry, you can get help to write the plan – and you should only include support that you are comfortable with.
- If this is for a child, you as the parent/carer will be heavily involved in planning to ensure it fits the child's best interests.

You can write this plan yourself or you can engage a representative or an advocate to support you to do this.

7. Approval of Plan: The local authority will review the support plan and approve the budget for the agreed support. They want to see the plan meets your assessed needs and that the costs are within the budget. This step is usually just a check to ensure everything is aligned; if there are issues, they'll discuss adjustments with you. Once approved, you move forward with arranging support.

8. Arrange Your Support: Now the exciting part – putting the plan into action. What you do here depends on which SDS option you chose (see Section 5 for options).

- If you choose Option 1 (Direct Payment), the council will pay the agreed budget into a bank account (usually a separate account you set up for this). You then arrange the support yourself – for example, recruit a Personal Assistant (PA) or pay for services you outlined in the plan. You'll manage the money, so keep records of spending.
- If you choose Option 2 (Individual Service Fund), you will work with your chosen provider or the council, who will hold the budget. You pick the support you want, and they handle the payments. You still direct how it's used.

2. How can I access SDS?

- If you choose Option 3 (Council-arranged), the social work department will organise services for you. For example, they might assign a care worker to visit your home on set days or arrange a day service. They handle the practical arrangements but should do so in line with your assessed needs and wishes.
- If you choose Option 4 (Mix), you'll do some combination of the above for different parts of the plan.

9. Managing and Reviewing: Once support is in place, you will live your life with that support – but there are a few ongoing responsibilities. You should monitor how the support is working and keep an eye on the budget usage. The council will likely review your situation at intervals to ensure the support is meeting your outcomes. You can request a review yourself if circumstances change or if the plan isn't working well. Remember, SDS is flexible so you can switch options or adjust the plan if, for example, you find a different solution would work better. Just communicate with your social worker about any changes.

Throughout this process, don't hesitate to ask questions.

If anything is unclear, ask the social worker to explain.

The system can feel complex, but you have the right to understand what's happening.

You can also seek independent advice at any stage (there are free advice services and charities that help with SDS – see "Top Tips" for more on this).

3. Who is eligible?

Eligibility means who can get social care support (and SDS) from the council.

In Scotland, any person, child or adult, with assessed care needs can be eligible – there is no age barrier. Children, adults, those in transition to adulthood, and carers can all get support under SDS if they need it. However, because resources are limited, councils use eligibility criteria to target those with the greatest needs.

- **Children and Young People:** A child (or young person under 18) with disabilities or significant additional needs may be eligible for social care support. For example, a child with a physical disability who needs personal care, or a young person with autism who needs support to engage in activities, could qualify. The assessment (often called a Child's Plan assessment) will determine this. If the child's needs are beyond what universal services like schools or health can provide, social work support is usually considered. Parents or legal guardians act on the child's behalf in SDS – meaning you will manage the support and make decisions in the child's best interest, in consultation with them.
- **Adults (18+):** Adults who have physical disabilities, learning disabilities, mental health conditions, long-term illnesses, or are older and frail may be eligible if those conditions mean they need help with daily living or staying safe and well. Typically, after an adult's community care assessment, the council uses eligibility criteria bands like low, moderate, substantial, critical needs. Many councils will provide support if needs are "substantial" or "critical". For instance, if without support the person's health or safety would be at significant risk. If you're an adult seeking support, be prepared to discuss how not having help affects your daily life.
- **Unpaid Carers:** Unpaid carers (for example, a parent caring for a disabled child, or an adult caring for their spouse or relative) can also have their own support needs assessed. Under the Carers (Scotland) Act 2016, carers are entitled to an Adult Carer Support Plan (or Young Carer Statement for young carers) to identify their needs as a carer. If a carer's needs meet local eligibility criteria for support, they too can get SDS – often this might be in the form of services or a budget to help them take a break, called respite, or maintain their wellbeing. For example, as a carer you might get an SDS budget to pay for someone to come sit with your loved one while you have time off, or to fund a short holiday break for you. It's important to note many carers don't recognise they have a right to support – but they do, and SDS applies to them as well.

Each local authority sets its own detailed criteria for who gets support. They will consider factors like:

- Can the person manage personal care on their own?
- Are they able to get out of the house independently?
- Is the carer getting enough rest?

3. Who is eligible?

Based on the assessment, the council decides if the needs are great enough to be eligible for funded support. If they are, you are eligible for SDS. If not, the council should still give advice. They might say your needs are below their threshold and in that case, you may need to look at community services or try again if things change. Everyone has the right to at least be assessed – so even if you're unsure if you qualify, it's worth asking for an assessment.

Unlike some services, SDS support is not automatically means tested. The assessment for eligibility is about your care needs, not your income. That said, councils can apply a financial assessment after deciding you are eligible, to determine if you should contribute to the cost. For example, most councils have policies where adults with income above a certain level pay a contribution for care. For children's services, there is generally no charge to families. Each council differs on charging, but the decision of whether you get support is based on need, not ability to pay. If any charges apply, they will inform you separately. In Scotland, personal care for adults is free if over 65; for under 65, some charges might apply for certain services.

If you believe you or your child needs help, you should request an assessment regardless of income or diagnosis. The law says everyone has a right to an assessment.

The worst that can happen is they find you're not eligible. Even then, they must explain and ideally point you to other help. If your needs change, you can ask again.

Being persistent and clear about the support you need is key. Do not be afraid to be assertive in explaining your family's situation and what things you find difficult.

4. How do I ask my Local Authority for support?

Approaching the local authority for help can feel daunting, but you have the right to ask for support and an assessment.

Here's how to go about it and make your case clearly:

- **Find the Right Contact:** Each council in Scotland has a social work department or Health and Social Care Partnership. You can start by calling the main social work contact number for your area (*see Section 7 for a list of contact details for every local authority*). When you call, say that you want to request an assessment for care or support needs. If it's for your child, ask for the Children and Families social work team; if for an adult, ask for Adult social care services. You can also request a carer's assessment if you are an unpaid carer. Many councils have a dedicated phone line for new referrals, some have a "Social Care Direct" hotline. Tip: If phone calls are difficult, you can email the social work department or even write a letter – what's important is to make the request. We've included a template letter below.
- **What to Say:** Be prepared to explain why you're asking for help. You don't need a long story at this stage – just a summary of the main issues. For example: *"I'm calling to request an assessment for my 10-year-old child who has autism. We're struggling to manage his care needs at home, and he needs support to take part in activities."* Or *"I am an unpaid carer for my mother, and I'd like an assessment for support – I'm finding it hard to cope on my own."* The key points to convey are who needs help, you or your child or family member, what difficulties or needs you have, and that you understand the council can provide social care support. You can mention Self-Directed Support specifically, *"I'd like to explore Self-Directed Support options for my family."*
- **Be Assertive and Clear:** It's important to communicate clearly and confidently. You might say, *"I believe I/my child has needs that meet the criteria for support, and I'd like an assessment to discuss these."* If the person you speak to tries to deflect, for instance, asking if you've tried other services first, you can politely insist: *"Our needs are significant, and I would like a formal assessment. I understand I have a right to be assessed for care services."* Remember, councils have a duty to assess anyone who appears to need care services. You do not need to already be in crisis to ask – early help can prevent things from getting worse.

4. How do I ask my Local Authority for support?

- **Request in Writing (if needed):** Some people prefer to make the request in writing so there's a record. A written request can be via email or letter to the social work department. Provide your name, address, contact, and a brief description of the situation and the fact you are requesting an assessment under the Social Work (Scotland) Act (for adults) or Children (Scotland) Act (for children) for the purpose of Self-Directed Support. We've provided a template letter below that you can adapt.

- **Keep Notes:** If you call, note down the date, the name of the person you spoke to, and a summary of their response. If they say someone will call you back or they'll send out a form, mark that down. If you don't hear back in a reasonable time, follow up with another call or a written reminder. Being politely persistent can be necessary and busy departments might need a nudge.

- **Prepare for the Assessment Meeting:** Once your request is received, you should be given an appointment or visit for the assessment. While you wait, start preparing gather any relevant information like medical letters or school reports for a child that show needs, and perhaps jot down key points you want to tell the social worker. Section 2 of this guide (Step 3) already covered what to think about. You can also ask if there's anything you should have ready. It's your right to have someone with you during assessment if you wish. A family member, friend, or an advocate can be present to support you and help communicate.

- **If You Face Barriers:** Sometimes people encounter gatekeeping. For example, a receptionist might say *"we're very busy"* or *"we'll send you some information first."* If you feel you're not being taken seriously, calmly reiterate your request. If necessary, ask to speak to a senior person or the duty social worker. You can also contact your local councillor or MSP if you continually cannot get an assessment, but this is rarely needed. Usually, asking firmly and following up suffices.

- **Know Your Rights:** It helps to mention that you are aware of SDS and your rights. For instance, you could say: *"I understand the Self-Directed Support Act means I have choices in how support is provided. But first I need an assessment to identify what support is needed."* This signals that you are an informed individual and people might then be less likely to give you the runaround. It's unfortunate, but showing you know the system can sometimes get you quicker results.

Remember that asking for help is okay.

Social work services exist to support the public. You are not "bothering" them – it is their job to assess and assist. Many parents and carers feel guilty or nervous when contacting authorities. Try to overcome that and speak as confidently as you can about what you or your child needs. If writing, keep the tone respectful but clear that you do need support.

4. How do I ask my Local Authority for support?

A template letter:

Below is a sample letter you can use to request an assessment from your local authority. You can copy and fill in the details relevant to you. Sending this by email or post to the social work department will formally register your request.

[Your Name]
[Your Address]
[Your City/Town]
[Postcode]
[Your Phone Number]
[Your Email Address]

[Date]

[Head of Social Work Services]
[Local Authority Name] Council
[Social Work Department Address]
[City, Postcode]

Dear Sir/Madam,

Re: Request for Care Needs Assessment for [Yourself/Your Child] under Self-Directed Support

I am writing to request a social care needs assessment for [me/my child/family member], in order to access support through Self-Directed Support (SDS).

***About [Me/My Child]: ***

Name: [Full Name]

Date of Birth: [DOB of person needing support]

Address: [Address of person needing support, if different from above]

***Reason for Request: ***

[Provide a brief description of the situation and needs. For example:

“My 15-year-old son has cerebral palsy and requires assistance with most daily activities. I am finding it increasingly difficult to care for him without additional support, especially as he is getting older. We are seeking support to help with his personal care and to allow him to engage in social activities.”

OR

“I am 67 years old and living with arthritis and failing eyesight. I am struggling with personal care and mobility at home. I would like to be assessed for support services to help me remain independent.”

4. How do I ask my Local Authority for support?

A template letter continued:

I understand that under the Social Care (Self-directed Support) (Scotland) Act 2013, I have the right to be offered Self-Directed Support options if I am assessed as eligible for care. I believe that [I/my child] have significant needs that merit an assessment.

I am keen to work with the assessment team to identify the support that will best meet [my/my child's] needs and to explore the SDS options available.

Please let me know when an assessment can be arranged. I am available to discuss this by phone or email; my contact details are provided above. I would also appreciate information on anything I should prepare or any forms I need to fill out in advance.

Thank you for your attention to this request. I look forward to your response.

Yours faithfully,

[Your Name]

Using the template:

- Fill in the blanks with your information and adjust the description to fit your circumstances.
- Keep it concise but do mention the key care needs.
- Make sure to date the letter and include how they can reach you.
- Once sent, the social work department should reply with confirmation and next steps (if you don't hear back in a couple of weeks, follow up by phone with the department to check they received it).

5. What are my options under SDS?

Under Self-Directed Support, you have four options for how your support is provided. These options are the core of SDS and range from you taking a direct payment to the council arranging everything.

You can choose the one that best fits your situation and this can be reviewed or changed over time if needed.

Option 1: Direct Payment – “Direct Payment” means the council gives you the money to arrange your own support. You or your representative receive the allocated budget as a cash payment, and you take responsibility for purchasing the care or support services you need. This option gives you the most choice and control. You can hire your own staff often called Personal Assistants or PAs, pay a care agency of your choice, or even buy equipment or community activities. As long as it meets the agreed outcomes in your support plan. With this flexibility comes responsibility. You must manage the money, keep records, and ensure the support meets your needs. You can pay a company to do a lot of the admin for you. Many families choose Direct Payments because it allows them to tailor support schedules, hand-pick support workers, and be creative. For example, using funds for swimming lessons or clubs that benefit the person, rather than traditional services. For children, the direct payment is paid to the parent or guardian to manage on the child’s behalf. For adults unable to manage money, an appointed guardian or power of attorney can manage the direct payment. Option 1 is cash in your hands to arrange support yourself, giving maximum control.

Option 2: Directing Support (Individual Service Fund) – Under Option 2, you choose your support and have as much control as Option 1 in deciding what you want, but you don’t handle the money directly. Instead, the council or a third-party organisation like a service provider holds the budget for you and pays for the services as you direct. This is often called an Individual Service Fund (ISF). You could pick a care agency or a charity to provide PAs, and the council will pay them from your budget. Or you might ask the local authority to commission a specific day service on your behalf. Option 2 can be a good choice if you want freedom to select and schedule services but prefer not to deal with financial paperwork. You remain involved in all decisions about what support you get, but you avoid being the employer or bookkeeper. Option 2 is “You plan, someone else pays.” You still design your support package, but the money is managed by the council or another agency according to your instructions.

5. What are my options under SDS?

Option 3: Council-Arranged Services – This is the more traditional route where the local authority’s social work department arranges and provides your services directly. Essentially, you ask the council to take charge of organising your support package. They might assign council-employed home care workers, a place at a day centre, respite care in a facility, or other services that the council contracts. You will have discussed your needs in the assessment and planning, but after that, the scheduling and management of staff is handled for you. Option 3 can be a good fit if you don’t want the responsibility of managing budgets or staff – the trade-off is that you have less flexibility or choice over who provides the support and when. The law still says your wishes should be respected, but realistically you’ll be choosing from standard services. Many older adults opt for Option 3, for instance, to have the council arrange daily home care visits. It’s important to note that SDS law requires even those on Option 3 be given choice as far as possible. You should be able to express preferences, but it is the least hands-on for you. Option 3 is “Services arranged for you by the council.” You get the support you need, but you let the authority handle the details.

Option 4: Combination of Options – Option 4 is essentially mix and match. You can use a combination of the other options for different aspects of your support. You might take a Direct Payment (Option 1) for one part of the plan like hiring a Personal Assistant for evening help while also using council-arranged services (Option 3) for another part like attending a council-run day service. You could also have another service via Option 2. This option acknowledges that one size may not fit all – you can customise which approach works for each part of your support. Many families find a combination useful. A parent of a disabled child might use a direct payment to employ a trusted individual for one-to-one support after school but also use council-provided short breaks occasionally. If you choose Option 4, you and the social worker will agree on which parts of the budget go to which option. Option 4 is “a tailored mix” – you have some support you manage directly, and some the council manages, in whatever proportion meets your needs.

5. What are my options under SDS?

When you're offered these options, the social worker should explain each one clearly and how it could work for you.

Feel free to ask questions like:

- *"What would Option 2 look like in my case?"*
- *"Can I switch later if Option 1 is too hard to manage?"*

By law, the explanation must be impartial – you shouldn't be steered unfairly to one option. The choice is yours, as long as the option is appropriate. They will assess if you or your representative can manage a Direct Payment, for example, but with support, most people can.

If the person needing support lacks capacity to choose or manage (for example, a very young child or an adult with severe cognitive impairment), they are still entitled to SDS.

In such cases, a guardian or representative can choose the SDS option and manage it for them.

The council might require legal authority like guardianship for someone to manage a Direct Payment on an adult's behalf, but they should guide you through that.

The key point is SDS is for everyone, including those who cannot make all decisions independently – the principle of choice and control can be exercised by a trusted person in those cases.

Choosing an option is not necessarily permanent. You can change your mind. For example, if you start with Option 3 but later decide you want more flexibility, you can request to move to an Option 1 or 2 (and vice versa).

Just communicate with your social worker. A new agreement or plan might be needed, but it's your right to choose a different route if your initial choice isn't working out.

Some families try out a Direct Payment and, if it becomes overwhelming, switch back to council services.

Others start with council services and later realise they want more control.

SDS is meant to be flexible.

6. Top tips for to manage SDS

Managing Self-Directed Support can be a new experience, especially if you opt for more control like a Direct Payment. Here are our top tips for making the most of SDS and overcoming common challenges. These tips will help you stay organised, assertive, and confident in using your support.

- **Understand Your Plan and Rights:** Keep a copy of your support plan and the agreement you have with the council. Make sure you know what the budget is supposed to cover and any conditions. Some councils give guidelines on acceptable uses of the money. Remember that you have a right to control how support is delivered, the funds are there to meet your outcomes, not to fit into a pre-set service. If at any point something isn't working or you feel your needs aren't met, you can ask for a review or change. Don't hesitate to speak up. You have the right to question decisions about your support and to be involved in any changes.

- **Stay Organised (especially for Direct Payments):** If you're managing a budget (Option 1 or part of Option 4), set up a system to organise paperwork. This includes bank statements, receipts, invoices from agencies or payslips if you employ staff. It's wise, and often required, to open a separate bank account dedicated to the Direct Payment. That way, it's easy to track what comes in and out. Keep a simple spreadsheet or ledger of all spending from your SDS funds. Note dates, amounts, and what it was for. Not only will this keep you on top of finances, but it makes any audit by the council straightforward. Keep all receipts for things you purchase with the budget like equipment and activities. If you pay wages to a Personal Assistant, keep copies of timesheets or payslips. Being organised from the start prevents stress later. If you're not confident with managing money, you can get support. Some areas have Independent Living support services that help with bookkeeping. You might also consider using a payroll company if you employ PAs. They handle tax, National Insurance, payslips for a fee.

- **Plan the Budget Carefully:** It's important to make the funds last for the support you need. Develop a simple budget plan. List your total budget (e.g., £ per week or per month) and outline how that money will be used. For instance, "*£300/week budget: £250 for 17 hours of PA support, £30 for club fees, £20 saved for respite.*" Always account for any employment costs if hiring staff. Their wages, holiday pay, employer NI contributions, possibly pension costs, and insurance, employers are required to have liability insurance. The council should advise if they include these on top of the hourly wage in your budget. It's good to leave a small contingency, a buffer, in your budget plan for unexpected costs. On the next page is a sample mini budget planner:

6. Top tips for managing SDS

Sample Weekly SDS Budget Plan:

- *Total Personal Budget: £300 per week*
- *Personal Assistant: £15/hour × 16 hours = £240*
- *Activities/Day Club: 1 session = £30*
- *Transport (Mileage or Taxi to activities): £10*
- *Contingency/Spare: £20*
- *Total planned spend: £300*

This is just an example. Your breakdown will reflect your plan. The key is to ensure your planned support fits within the budget. If it doesn't, you may need to adjust hours or types of support or discuss with the council if the budget needs revisiting. Use a similar planner monthly or whatever period your budget is managed over. This tool not only guides your spending but also is handy to show the council that you are using funds appropriately, if ever asked.

• **Be a Good Employer (if you hire Personal Assistants):** Employing your own staff gives great flexibility, but it also means taking on employer responsibilities. Make sure you follow legal requirements: issue a simple contract, pay at least the minimum wage (the Scottish Government expects PA rates to meet at least the Real Living Wage in many cases), and have employer's liability insurance. Use a payroll service or software to handle tax and pension duties. Many councils will fund payroll service costs in your budget. Treat your PA's with respect and communicate clearly about their duties and your expectations. It's wise to have a back-up plan for coverage if a PA is sick or on holiday. Maybe another part-time PA or an arrangement with an agency for emergencies. Don't be afraid to ask your social worker or support organisation for help with being a new employer. There are resources out there like Personal Assistant employer handbooks from support organisations. We've included a sample job advert template in this section to help you find the right PA.

• **Use Independent Support and Advice:** You are not alone in managing SDS. There are organisations across Scotland that offer free advice, peer support, and advocacy for people using SDS. Local Centres for Inclusive Living or carers' centres can help with paperwork or navigating issues. The law actually requires councils to point you to independent advice services for SDS – take advantage of this. If you're unsure how to handle any aspect, like recruiting a PA, or challenging a decision, an independent adviser or advocate can be a great help. They can even come to meetings with you if you're feeling outnumbered or unsure. Peer support, talking to other parents or carers who use SDS, can also provide practical tips and moral support. Ask your social worker if there are any local peer groups or check online forums for SDS in Scotland.

6. Top tips for managing SDS

- **Communication is Key:** Maintain good communication with your social worker or SDS advisor. Let them know if things are going well or if there are problems. If your PA quits and you're struggling to find a replacement, inform the council – they might offer temporary help or extend deadlines for spending the budget. If you don't use all the money immediately because maybe you're saving for a piece of equipment, let them know the plan so they understand unspent funds are earmarked. Being proactive and transparent builds a positive relationship. Also, don't hesitate to ask the social work department questions about procedures, such as: *"How do I submit my financial returns?"* or *"When is my support review due?"*. It shows you're on top of things.

- **Assertiveness and Advocacy:** If something isn't right, like the provided service is not meeting your needs, or the council delays payments you should speak up promptly. You can write an email outlining the issue and what you'd like done or request a meeting. When voicing concerns, stick to facts and refer to your rights or the plan: *"According to my support plan, I should have 10 hours of support, but this week only 6 hours were delivered due to staff shortage. This is impacting me because... I need the full support in place or a suitable alternative."* Being assertive is about being firm and clear, not rude. If you feel you aren't being heard, involve an advocate or escalate to a manager. Remember, you are the expert on your own needs. It's okay to challenge decisions. If the council suggests cutting your budget and you disagree, you can appeal or at least request a thorough review with evidence. Many carers mention that persistence is necessary in the system. Don't give up if you encounter a hurdle. There are formal complaint processes if needed, but often issues can be resolved through dialogue and showing that you're knowledgeable about SDS and your rights.

- **Keep Evidence of Outcomes:** SDS is all about meeting outcomes. The goals set in your plan. It's useful to keep notes or evidence of how the support is benefiting you or your child. Maintain a short journal: *"With PA support, John attended swimming club twice this month, which has improved his confidence,"* or *"Since using the day service, mum's mobility has stabilised, and she is happier."* During review meetings, you can highlight these positives. Conversely, note any unmet needs: *"We planned for 4 outings a month but only managed 2 due to not having enough support – need to adjust plan."* This outcome-focused thinking helps ensure the support remains appropriate and can justify if you need to ask for more or different support. It shifts conversations from money to quality of life, which is the whole point of SDS.

6. Top tips for managing SDS

- **Take Care of Yourself:** Lastly, especially for carers, remember SDS is there to improve quality of life for your whole family. Try not to get so bogged down in managing it that it adds stress. Use the support to actually get breaks and improve wellbeing. If you have a direct payment and find the admin overwhelming, ask for help. Sometimes the council can offer additional support, or you could move to Option 2. The goal is for SDS to empower, not burden you. When it's working, SDS should indeed make things easier. It can allow you to arrange support when and how it suits you, which can reduce stress and burnout. Celebrate the wins, if your child learns a new skill with their PA or you manage a weekend off from caring thanks to respite, that's a success of SDS in action.

These tips come from experienced SDS users and professionals.

Over time, you'll develop your own rhythm in managing SDS.

Don't be afraid to ask, *"Is there a better way to do this?"* at any time.

Flexibility is the strength of SDS and it can bend and adjust to your life as long as you advocate for what's needed.

With good organisation and support, you absolutely can manage SDS and direct the support effectively.

If you are looking for area specific projects that can provide more information on how to manage SDS, you can look into the Scottish Government's 'Support in the Right Direction' (SiRD) programme. This is a programme of work funded by the Scottish Government and monitored by Inspiring Scotland.

You can look for SiRD funded services in your area by searching for 'SiRD projects map' online or visiting the Inspiring Scotland website.

7. Self-management checklist

Use this checklist to make sure you've covered the key tasks when starting and managing Self-Directed Support (especially useful for Direct Payments):

- **Separate Bank Account:** Open a dedicated bank account for any direct payment money. This makes tracking and reporting easier.
- **Written Agreement:** Sign any necessary agreement with the council for the SDS funding. They often have a contract outlining responsibilities. Keep a copy.
- **Insurance:** If employing PAs, arrange Employers' Liability Insurance. Your council may direct you to approved insurers and include the cost in your budget.
- **Payroll Setup:** Set up a system to pay employees or providers. This could be registering as an employer with HMRC and using a payroll service or simply keeping provider invoices to pay.
- **Recruitment Plan:** If needed, advertise for Personal Assistants or choose an agency. See the sample job advert below for hiring a PA.
- **Contracts/Service Agreements:** If you hire a PA, create a simple employment contract covering hours, pay, duties, notice period, etc. If you use an agency or service, ensure you have any service agreement in writing.
- **Backup Plan:** Identify a backup in case a PA is off sick, or an agency carer cancels. This could be a second part-time PA, a willing family member, or an emergency arrangement with a care agency. Discuss contingency plans with your social worker. They might approve some budget for emergency use.
- **Record Keeping:** Maintain a file, either physical or digital, with all SDS-related documents. This includes support plan, council correspondence, bank statements for the SDS account, invoices, receipts, payslips, timesheets, and insurance documents. Keeping them in one place saves time when preparing for a review or audit.
- **Spending Logs:** Record each spend from the budget in a diary or spreadsheet. Note the date, amount, and what it was for. This will help you fill in any financial return forms the council asks for.
- **Review Dates:** Know when your next review with social work is due. Mark it on your calendar. A review is typically annually but can be sooner if you request or if circumstances change.

7. Self-management checklist

- **Outcome Tracking:** Jot down any major positive changes or remaining challenges with the current support. This will be useful information for the review meeting to either continue what's working or adjust what's not.
- **Independent Support:** Have contact info for a local SDS support organisation or advice line in case you have questions. Self Directed Support Scotland (SDSS) or local carer centres. It's good to have an ally if you hit a snag.
- **Stay Informed:** Keep up with any changes in SDS policy or local practice. Your council might update their guidelines. They should inform you, but you can also check their website occasionally or sign up for any newsletters.
- **Self-Care:** Monitor how managing SDS is affecting you. If it becomes too much, remember you can consider switching options or ask the council for more support with management. SDS should help, not harm your wellbeing.

Feel free to tailor this checklist to your situation.

Not all points apply to everyone. If you choose Option 3 fully, many of these won't apply because the council handles it.

Your checklist might simply be to check schedules and ensure the service is delivered.

For those taking more control, this checklist can be a handy starting point to stay on track.

7. Self-management checklist

Sample Personal Assistant Job Advert Template

If you choose to hire a Personal Assistant (PA) using a Direct Payment, you'll likely want to advertise the position to find the right person. Here's a template for a job advert that you can customise and use on job boards, social media, or local newspapers/community boards:

*****Job Title: ** Personal Care Assistant (Self-Directed Support)***

*****Location: ** [Your Town/Area], Scotland***

*****Hours: ** [e.g. 10 hours per week], [preferred schedule, if any, e.g. afternoons and some weekends]. *(Flexibility required.) ****

*****Rate of Pay: ** £ [XX.XX] per hour (gross) – funded via Direct Payments.***

*****Job Description: *****

We are looking for a reliable and compassionate Personal Assistant to support a [child/young person/adult] with [brief description of condition, e.g. "with a physical disability" or "additional support needs"]. The role involves helping with day-to-day activities to enhance [his/her/their] independence and quality of life.

*****Duties will include: *****

- Assistance with personal care tasks such as [list any that apply bathing, dressing, toileting] (if applicable).*
- Supporting with mobility and transfers (training can be provided if needed).*
- Accompanying to community activities, appointments, or outings (e.g. going to clubs, shopping, leisure activities).*
- Providing companionship and enabling engagement in hobbies and social activities.*
- Light household tasks related to care (e.g. preparing meals, tidying up after activities).*

*****About the Person: *****

*The ideal candidate is ****patient, trustworthy, and proactive****. You should respect privacy and promote independence. Experience in a care role is [preferred but not essential], as finding the right personal fit is most important. ****Training**** can be provided if needed. A driving license and access to a car is [required/preferred/not necessary] (include this if travel/driving is needed for the role).*

7. Self-management checklist

Sample Personal Assistant Job Advert Template

****Hours and Schedule: ****

Approximately [10] hours per week. [For example: 2 hours each weekday evening and 5 hours on Saturdays (flexible)]. We can discuss exact times to suit both parties. Some additional hours may be available occasionally by agreement.

****Pay and Benefits: ****

Pay is £[XX] per hour. As this role is funded by a Direct Payment from the council, you will be employed directly by the [family/individual]. You will receive statutory paid holidays and National Insurance contributions. Training relevant to the role (e.g. moving and handling, first aid) will be provided or paid for.

****Additional Information: ****

*The successful candidate will be required to undergo a ****PVG check**** (Protecting Vulnerable Groups scheme) for working with [children/vulnerable adults]. The cost of this will be covered. We welcome applicants from all backgrounds.*

****How to Apply: ****

*Please apply by [method – e.g. “sending your CV and a brief cover letter” or “requesting an application form”]. You can contact [Name] at [email address] or [phone number] for more information or to submit your application. ****Closing date: **** [if you have one].*

**This position is funded through Self-Directed Support. If you are friendly, caring, and want to make a real difference in someone’s life, we’d love to hear from you! **

How to use this template: Adjust the specifics in brackets [___] to match your situation. Change the hours, describe the person and support needs, set the pay rate. Ensure it meets at least minimum wage. Many pay at or above real Living Wage if budget allows.

Include any special requirements like “*must be able to swim*” if the role involves swimming, etc.

The tone should be professional but warm – you’re essentially inviting someone to work in a one-on-one setting, so personal compatibility matters.

7. Self-management checklist

Sample Personal Assistant Job Advert Template

When advertising, you can use local job sites, Gumtree, Facebook groups. There are often local “PA needed” groups or SDS groups, or ask the SDS support organisations if they have a PA register. Some areas have a Personal Assistant Network where you can list vacancies. Always follow safe recruitment. Check references and complete the PVG (protection of vulnerable group) process before finalising employment.

Tip: Interview candidates with another person present if possible to get a second opinion. Prepare a few questions in advance about their experience, why they’re interested, and scenario questions. You don’t need to be an HR expert. Ensure you are comfortable with the person and trust them, as they will be working closely with your family.

By following these tips and utilising the provided tools like the checklist and templates, you will be well on your way to managing Self-Directed Support effectively. SDS can sometimes feel like extra work, but with good practices, it becomes second nature and the payoff is support that truly fits your life and empowers you or your loved one.

8. Contact details for Local Authorities

Below is a list of contact points for social work SDS inquiries in each local authority in Scotland. You can call these numbers to request an assessment or get information. These contacts are for main social work offices or customer lines in each council. Always check the council's website for the most up-to-date details as numbers can change. In an emergency out of hours, most councils have an emergency social work number – typically available via their main phone line.

Aberdeen City: Adult Social Work Contact – 0800 731 5520 (Freephone); Children's Services – 01224 504 350. (Email: Duty@aberdeencity.gov.uk for adult referrals.)

- Aberdeenshire: Social Care enquiries – 03456 08 12 08. (Aberdeenshire operates local area offices: e.g. Aboyne 013398 87096, Fraserburgh 01346 510445, etc., but the 0345 number will direct you to the right team.)

- Angus: Social Work Department – 01241 435678.

- Argyll & Bute: Social Work Department – 01546 605 517. (For adult services in Argyll & Bute, also 01546 605522.)

- Clackmannanshire: Adult Care – 01259 727 010; Child Care – 01259 225 000. (General Social Services enquiries: 01259 452 498.)

- Dumfries & Galloway: Adult Social Services – 030 33 33 3000. Children & Families – contact local offices (e.g. Dumfries 01387 273600).

- Dundee City: Children and Families Services – 01382 433071; Community Care (Adults) – 01382 438 300. (Email for Dundee: cis@dundeecity.gov.uk for children, audrey.may@dundeecity.gov.uk for community care.)

- East Ayrshire: Social Work (Headquarters) – 01563 503 301. (Email: social.work@east-ayrshire.gov.uk. Local area offices in Dalmellington, Galston, etc., can be reached via HQ.)

- East Dunbartonshire: Social Work Department – 0141 355 2200.

- East Lothian: Social Work Department – 01875 824 309.

- East Renfrewshire: Social Work Department – 0141 800 7850 (or 0300 343 1505).

- City of Edinburgh: Social Care Direct – 0131 200 2324 (for adults); 0131 200 2327 (for Children). For general children's services enquiries you can also use 0131 200 2000.

8. Contact details for Local Authorities

- Falkirk: Social Work Information Line – 01324 506 400.
- Fife: Health & Social Care Contact Centre – 03451 55 15 03. (Alternative: Fife Social Work Offices central line 01334 659323.)
- Glasgow City: Social Care Direct – 0141 287 0555. (Glasgow also has local area social work offices with numbers for different districts, but the main 0141 287 0555 will connect you to the right team.)
- Highland: Highland Council Social Work – 0845 769 7284 (use main council line, they will direct to social care). Out-of-Hours: 0845 601 4813.
- Inverclyde: Inverclyde Health & Social Care Partnership – 01475 715010. General Social Work Department – 01475 714 400. (Out-of-hours: 0300 343 1505.)
- Midlothian: Social Work Department – 0131 270 7500. (Email: social.work@midlothian.gov.uk. Local offices: Dalkeith 0131 271 3860, etc.)
- Moray: Social Work Access Team – 01343 563 999. (Email: accesscareteam@moray.gov.uk. This “Access Care” line in Moray is first point of contact for all social care inquiries.)
- Na h-Eileanan Siar (Western Isles): Social Work Stornoway – 01851 822 708. (Other area offices: Tarbert 01859 502 973, Balivanich 01870 604 984, Castlebay 01871 817 217.)
- North Ayrshire: Health & Social Care (North Ayrshire) – 01505 684551. (For Child Protection concerns: 01294 310 444.)
- North Lanarkshire: Social Work Enquiries – 0800 121 4114 (this connects to North Lanarkshire’s Social Work First Stop). Local office examples: Airdrie 01236 757000, Motherwell 01698 332100, etc.
- Orkney Islands: Orkney Health and Care – 01856 873 535.
- Perth & Kinross: Social Care (Community Care Access Team) – 0345 30 111 20. (They also have a dedicated Self-Directed Support team at 01738 476 938.)
- Renfrewshire: Social Work Department – 0300 300 1199. (Email: adultservicesreferral.sw@renfrewshire.gov.uk for adult referrals.)
- Scottish Borders: Social Work enquiries – 0300 100 1800.

8. Contact details for Local Authorities

- Shetland Islands: Social Work Department – 01595 693535. (Out-of-hours emergencies: 01595 744 400.)
- South Ayrshire: Social Work Department – 0300 123 0900. (Adult Support & Protection: 01292 612055, general inquiries go via the main line.)
- South Lanarkshire: Social Work Resources – 0303 123 1008. (South Lanarkshire also has local offices in Hamilton, East Kilbride, etc., but the 0303 number is central.)
- Stirling: Social Work Department – 01786 404040.
- West Dunbartonshire: Social Work – 01389 776499 or 0141 562 8800 (main Council Contact Centre, ask for Social Work). Adult Services offices: Clydebank 01389 811760, Dumbarton 01389 737020.
- West Lothian: Social Work Department – 01506 282 252. (Email: socialwork@westlothian.gov.uk.)

When you call any of these numbers, explain that you want to discuss Self-Directed Support or request an assessment for care needs. The call handlers will guide you to the correct team. Many councils have a single point of contact for all social care inquiries, while others might transfer you to specific children's services or adult services teams.

Keep this contact list handy. If you move to a different council area, you'll need to contact that new local authority for SDS. SDS does not transfer automatically if you relocate – you'd be assessed by the new council.

Tip: It's often helpful to visit the council's official website for additional information on how they handle SDS. Some councils have downloadable SDS guides or referral forms online.

We hope this SDS Information and Advice Book has given you a clear roadmap to accessing and managing support for you or your family.

Self-Directed Support is a powerful tool and it exists to give you more control and better outcomes.

While the system can be complex, knowledge is power. Understanding your rights, knowing the steps, and using the tips and tools provided will help you navigate with confidence.

Remember that you are not alone. Support is available at every stage, whether from social workers, independent advisors, or fellow carers who have been able to set up their SDS budgets.

By being informed and proactive, you can overcome common barriers like confusing processes or feeling hesitant to speak up.

Be encouraged that many families across Scotland have successfully used SDS to arrange creative, person-centred support. Enabling children to attend clubs and family outings, allowing disabled adults to live independently with personal assistants of their choosing.

Your needs and goals matter, and SDS is there to support them.

Good luck on your Self-Directed Support journey.

With the information in this guide, you are empowered to take the next step and make SDS work for you!