This booklet is for people who experience mental-health problems and who are interested in getting access to self-directed support in Scotland. Self-directed support is designed to help people to manage their own social-care support and choose the services that suit them best. The booklet will give you some information and allow you to make an informed decision about whether to get self-directed support. It will also explain how self-directed support can help you to manage your mental health.
About this booklet

This booklet is for people who experience mental-health problems and who are interested in getting access to self-directed support in Scotland.

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The booklet will give you some information and allow you to make an informed decision about whether to get self-directed support. It will also explain how self-directed support can help you to manage your mental health.

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What is self-directed support?

In this booklet, we use the term ‘self-directed support’ but you may know this as ‘direct payments’. However, new guidance on self-directed support, published in 2007 under Section 5(1) of The Social Work (Scotland) Act 1968, has replaced earlier guidance on direct payments issued in 2003.

By publishing this new guidance, the Scottish Government aimed to increase the number of people who choose to get access to self-directed support. By using the term ‘self-directed support’, the Government wanted to make sure that the guidance focused on the results of the support, rather than the way in which it is provided (by direct payment).

If you are entitled to social-care support from your local council, self-directed support is a cash payment made to you in the form of an ‘individual budget’. This payment allows you to arrange alternatives to services your local council provides or buys to meet your needs. Self-directed support will give you the flexibility and control to decide what will best help you to manage your mental health.

With self-directed support, you will be at the centre of the planning process as you are the best person to understand your own needs. You will be told exactly how much money you have to spend on your care and support. This amount of money is known as your ‘individual budget’. This means that you will be in charge of your own support arrangements, which should help you to organise your life in the way that you want.

Self-directed support and mental health

Self-directed support can be an important method you can use to manage your mental health. For example, you might use the money to pay for:

- support workers or services;
- respite breaks (holidays);
- complementary therapies (such as massage and aromatherapy);
- education;
- leisure or arts;
- training; or
- career guidance.

Self-directed support could allow you to go to computer or music lessons, join fishing or other leisure clubs, or volunteer to help other people. You might arrange for a support worker to help you to attend yoga or aerobics classes or go swimming. As your mental health may vary, it may be that you sometimes need more help and support than at other times.
As self-directed support puts you in control of the support you receive, it might reduce the need for you to use crisis services or be admitted to hospital. The payments might also help reduce the amount of time you spend in hospital if there is support in place at home for you to leave hospital sooner. People who have used self-directed support confirm that managing the payments has also helped them to build their confidence and self-esteem. Many people feel that self-directed support has helped them to do more with friends, family and the community.

Who can get self-directed support?

Since 2003, all Scottish local authorities and councils have had a duty to offer people who are entitled to receive social-care services the opportunity to manage their own support. Anyone who receives support services from the local council, community support services, housing support services or children’s services may be entitled to self-directed support. This includes people with mental-health problems.

If you meet your local council’s conditions to receive social care, there are only very limited circumstances in which you would not be offered self-directed support. It may be that your assessed needs do not qualify for this form of support, but the only way to find this out is to ask for an assessment from your local council’s social-work department. If you are not entitled to this form of support, your local council will explain this to you.

How to get self-directed support

To receive self-directed support, you must first have your needs assessed. Your ‘needs assessment’ will decide what level of self-directed support you are entitled to.

To ask for an assessment of your needs, contact your local council’s social-work department or talk to someone (for example, a community psychiatric nurse in your Community Mental Health Team) who will be able to put you in touch with the relevant staff to carry out the assessment.

For some services, including self-directed support, your local council may make a charge. If you want to know more about charges, you should discuss this with the person carrying out your assessment.
Three steps to getting self-directed support

**Step 1**
You will need to be entitled to support from your local council’s social-work department. A social worker or care manager can help with this. (A care manager is someone who plans, arranges and organises your support, and makes sure that it is paid for. If you decide that a care manager is the best person to help you, the local council will keep this money and use it to pay for your services.)

**Step 2**
You will need to fill in an individual budget assessment form. This will help to identify your needs. Once you have filled this in, you will be told how much money you can have to meet your needs. The assessment looks at areas of your life in which you need support, such as:

- personal care (for example, help with bathing);
- getting access to opportunities in the community (such as attending college or joining community groups);
- keeping safe (for example, getting around safely); and
- aspects of daily living (for example, help with cooking meals).

**Step 3**
You will be asked to write a ‘support plan’. You can do this on your own or with help from someone else (see the next section). This plan will say how you intend to use the money. You will need to agree the plan with your social worker or care manager.

Your support plan

You might want to write your support plan yourself or get help from someone else. Local disability rights organisations or mental-health service user groups can help. Some local councils have produced support planning guides that can help you to think about what needs to be in your plan. Or, you could get help from family, friends or other people who you think might be in a position to help you. It can also help to keep a diary for a week or two to identify what support you need.

When you write your support plan, think about the needs you identified in your individual budget assessment and what results you want the support to achieve.

You may only be able to achieve some of these results with extra support from family, friends and other organisations, and by making a special commitment yourself.

However, the support plan will help everyone work out who needs to do what to achieve each of the results. Your plan should identify what results you want to achieve and what support you need to help you. It’s your support plan – it does not need to be written in a certain way. The most important thing is that it makes sense to you.
How can self-direct support be used?

You need to use your self-directed support to meet the needs you identified in your assessment and support plan. However, you can be flexible with how you use it.

Some examples of how you might use this money include:

- employing a personal assistant;
- buying support from a care or support agency of your choice;
- getting access to other community-based activities;
- buying services from any local council;
- paying for transport (such as taxis);
- paying for a break away for you or your carer;
- buying a piece of equipment (such as a computer);
- paying for education or training; or
- contributing to the costs of leisure and artistic activities.

Your social worker or care manager will have a checklist for support plans, which will ask questions such as the following.

- Does your support plan talk about your needs and how they are going to be met?
- Does the plan identify how you are going to keep healthy, safe and well?
- Does the plan say how you are going to organise your support?

Once your assessment has been done, you can discuss the option of self-directed support with the person who carried out the assessment. You need to talk about and agree the arrangements that you would like to have in place to meet your assessed needs.

Employing a personal assistant

If you choose to use your self-directed support to employ your own personal assistant, you will have legal responsibilities as an employer. It is up to you to make sure you are aware of these responsibilities and keep to them. Local disability rights organisations, Centres for Independent Living, Scottish Personal Assistant Employers Network or mental-health service user groups should be able to provide independent advice, support and information about employing your own staff. A number of disability groups (such as Centres for Independent Living) will also be able to provide you with a payroll service to look after paying wages, tax and so on.
Normally, you will not be able to employ close relatives to provide support services. This is because of the very different relationships that you would have with an employee and with a family member, and the conflicts of interest that can result from employing a close relative. Self-directed support is not meant to replace the help you get from your family and community, so you cannot use funds from the local council to employ:

- your husband, wife or partner; or
- close relatives and their partners.

If you would like to employ or buy services from someone who might be in one of the above categories, you should discuss your situation with your local council or talk to your community psychiatric nurse. In exceptional circumstances, your local council may be prepared to consider allowing you to use self-directed support to pay a close relative.

Following the guidance on self-directed support published in July 2007, all personal assistants must get a thorough criminal records check (this is currently in the form of an ‘enhanced disclosure check’ through Disclosure Scotland). This check will help you to make sure that the person you employ is suitable to provide you with support. For more information on the enhanced disclosure check, contact the Scottish Personal Assistant Employers Network (SPAEN) or Disclosure Scotland (see the ‘Other information’ section for contact details).

**Buying services from a care agency**

You can buy services from any social-care agency you choose. All social agencies have to be registered with the Care Commission and meet certain minimum standards. You can check if an agency is registered by contacting the Care Commission (see the ‘Other information’ section for contact details).

It is important that you meet with any care agency you want to use, so that you can decide if they can provide you with the support you feel is right for you. It is also very important that the care agency understands and agrees with you on the kind of support you would like to receive.

To make sure that you receive a good quality of service, it is important that you ask the care agency to draw up a contract with you, setting out what you can expect from them and what you can do if you are not happy about any part of the service they provide. The Care Commission can give you information about what you can expect from registered care agencies and has information about the agencies’ quality of service.
Day care and respite (taking a break)

You can use self-directed support to buy a range of services, including respite, transport or day care provided through voluntary and private organisations. This can include taking a break if it helps to meet your assessed needs.

Services from local councils

You may also be able to buy the services described above from any local council – it does not have to be the local council of the area you live in. This may help if you travel to visit a relative or friend for long periods, or if you would rather receive support outside of the area you live in. This will also help if the support you need (such as a particular educational opportunity) is not available in your area.

Managing your self-directed support payment

Managing the money the local council gives you may seem like a daunting and challenging task. But there are a number of different ways you can do this, and support should be available to help you. There are several ways you can manage the money, including the following.

<table>
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<tr>
<th>Money paid to you direct</th>
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<tr>
<td>You can receive your money direct if you want to manage your support yourself. This will mean that you will be responsible for paying for and organising the support. You won’t be on your own though – you can get help with recruitment and payroll from an independent support agency. (There are some independent support agencies listed at the end of this leaflet.)</td>
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<th>Money paid to an ‘agent’</th>
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<td>This is when someone else manages the money for you. This can be a family member or friend. An organisation can also manage the money for you if you think that you will find this difficult – they call this a ‘managed account’.</td>
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<tr>
<th>A user-controlled trust</th>
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<td>This is when your money is paid to a group (this might be a group of friends or family members) who form a trust and manage the money for you. The council and the trust will set up a contract between them, and arrange to pay the money to the trust.</td>
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</table>
An individualised service fund
This is when the local council pays your money to a service provider who you have chosen to provide your support. The service provider has to keep this money separate from all its other money and use it only to pay for the support that you have identified in your support plan.

A care manager
The care manager acts on your behalf. They plan, arrange and organise the support for you, and make sure that it is paid for. If you decide that a care manager is the best person to help you, the council will keep this money and use it to pay for your services.

Whatever approach you choose, you (or the person or people managing your money for you) will need to fill in a financial return to show the local council what you have spent. Also, a social worker or care manager will visit you every so often to review your needs. This review will focus on:
• what’s working well; and
• things that might need to change.

If your needs increase, you may need another individual budget assessment – talk to your care manager about this. You will also need to tell your social worker or care manager if you no longer need certain support or services.

Your individual budget is not personal income – it is paid to you to meet your needs. You do not need to declare it for tax or benefit purposes.

Some common questions

If I am entitled to social-care services, am I automatically entitled to self-directed support?
Yes, most people who get social-care services have a right to self-directed support. There are some limited circumstances in which self-directed support is not given and your council will be able to tell you about these. If you plan to employ staff, you will need to show that you can meet your legal responsibilities as an employer.

If my local council offers me self-directed support, can I refuse it?
Yes. You do not have to take self-directed support. You can choose to receive services your council have arranged, or you can have a mixed package where you manage only some of your support and your local council arranges the rest. Some people try out self-directed support this way to see if it suits them.
What responsibilities will I have?
Self-directed support offers you much more flexibility, but managing it is also a responsibility. You are in charge of arranging the services you have agreed to meet your needs, sorting out any problems with the service and accounting for the way you use your money. If you use the money to employ your own staff, you will have the legal responsibilities of an employer, including a responsibility to treat people you employ fairly.

However, it is important to recognise that there is help and support available to do this. Working out what support you want to receive is vital, and will help you to make the right decisions and be confident about managing self-directed support.

Your local disability rights organisations or mental-health service user groups should be able to give you advice on this.

What can I do if I don’t think the payments are enough?
If you would like to dispute the amount you are offered for your support plan, you will need to agree with your local council what arrangements will be in place while the dispute is being settled. You can either accept the individual budget you are offered until an agreement is reached, or receive the services your local council have arranged.

Can I change how I spend my individual budget?
You will need to discuss with your local council what kinds of changes need to be agreed beforehand, and the kinds of changes you can make on your own without asking.

Will I have to pay part of the money for my self-directed support?
To receive any service from your local council, your finances will need to be assessed (‘means-tested’) to see whether you should contribute some money to help pay for it. If you receive self-directed support, the local council will charge you in the same way they charge people for other arranged services. If you need to pay a contribution towards the cost of your self-directed support, the local council should pay the total amount and take your contribution from you later. The local council will give you clear information about how much money you need to contribute.

How will I make sure that I have recruited the right person as a personal assistant?
If you want to employ a personal assistant, Centres for Independent Living and disability rights organisations can provide initial advice and guidance on employing suitable people. This may include advice on how and where to recruit people, taking up references and carrying out interviews.

The enhanced disclosure check is an important aspect of safe recruitment. You can contact Disclosure Scotland, your local Centre for Independent Living or the Scottish Personal Assistant Employers Network (SPAEN) for advice and information about these checks.

It is often a good idea to recruit a personal assistant on a trial basis to begin with, as this will help you make sure that they are right for you. If you find that someone you employ is not carrying out their job effectively, SPAEN can provide advice on dealing with these kinds of issues and whether you need to take more formal action.
What if I find I am not able to manage the money?
There may be times when you are not able to manage your self-directed support yourself. This may be because your mental health has worsened or you have a problem with your physical health. In these situations, the local council can agree that another appropriate adult or organisation can help you. You can add your wishes in these circumstances to any advance statement that you may already have. (An advance statement is a written statement drawn up when a person is well, which sets out how they would prefer to be treated, or not treated, if they become ill in the future. It must be signed in front of a witness.) However, you will need to agree these kinds of arrangements with the local council beforehand.

What happens if I go into hospital?
If you go into hospital for any length of time, either due to your physical health or your mental health, this may mean that you will not spend all of your money. In this case, you should contact the local council, who will consider any contracts you may have with service providers or personal assistants before agreeing how best to manage this. If you are not able to contact the council yourself, you can ask another responsible adult (such as ward staff) to do so on your behalf. Again, you may consider using an advance statement to say who should act on your behalf in circumstances such as these.

What if I don’t want to continue to receive self-directed support?
You can opt out at any point and switch to local-council services if they are available. You should discuss this with the worker who is dealing with your self-directed support or make a new referral to the local council’s social-work department.

Will self-directed support affect my benefits?
Self-directed support will not affect your state benefits or income tax payments.

If I choose to manage my own individual budget, how will this money be paid?
The money will be paid into a bank account. You should set up a separate bank account to help you keep track of this money and manage it separately. For help with setting up a bank account, contact any of the local support agencies listed at the end of this leaflet.

Is there any other funding I can apply for?
There are a number of other sources that might be able to provide funding – for example, the Independent Living Funds (ILF). Find out more about ILF at www.ilf.org.uk or by phoning 0845 601 8815.
**Local support services**

This list provides contact details of local support services. If there is currently no support service in a certain area, we have provided details of the self-directed support advisor from the local council instead.

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<th>Aberdeen</th>
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<td>Kirkgate House</td>
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<td>St Nicholas Street</td>
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<td>Aberdeen</td>
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<td>AB10 1HW</td>
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<tr>
<td>Direct Payments Coordinator: Elaine Berry</td>
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<td>Phone: 01224 264 090</td>
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<tr>
<td>Email: <a href="mailto:eberry@aberdeencity.gov.uk">eberry@aberdeencity.gov.uk</a></td>
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<th>Direct Payments Caledonia</th>
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<td>Unit 13</td>
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<td>Huntly Business Centre</td>
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<td>AB54 8FG</td>
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<td>Phone: 01463 224740</td>
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<td>Email: <a href="mailto:info@dpcaledonia.org.uk">info@dpcaledonia.org.uk</a></td>
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<td>Website: <a href="http://www.dpcaledonia.org.uk">www.dpcaledonia.org.uk</a></td>
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<td>Thomas Herd House</td>
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<tr>
<td>Contact: Barbara Maguire</td>
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<td>Phone: 01382 226440</td>
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<td>Email: <a href="mailto:directpayments@dundeecarerscentre.org.uk">directpayments@dundeecarerscentre.org.uk</a></td>
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<td>Sensory Impairment</td>
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<td>PA23 8DQ</td>
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<tr>
<td>Direct Payments Advisor: Dinah Macdonald</td>
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<td>Mobile: 07795 052 656</td>
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<tr>
<td>Email: <a href="mailto:dinah.macdonald@argyl-bute.gov.uk">dinah.macdonald@argyl-bute.gov.uk</a></td>
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<td>Anderson’s Chambers</td>
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<td>Market Street</td>
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<td>Phone: 01896 759700</td>
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<td>Email: <a href="mailto:borders.directpayment@virgin.net">borders.directpayment@virgin.net</a></td>
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<td>Website: <a href="http://www.bordersdpa.org.uk">www.bordersdpa.org.uk</a></td>
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<td>Region</td>
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<td>Clackmannanshire</td>
<td>Forth Valley Direct Payments Support Service</td>
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<td>Dumfries and Galloway</td>
<td>Dumfries and Galloway Council Direct Payments Support Service</td>
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<td>Dundee</td>
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<td>East Ayrshire</td>
<td>Ayrshire Independent Living Network (AILN)</td>
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<td>East Dunbartonshire</td>
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<td>East Lothian</td>
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<td>Norton Park Centre</td>
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<td>57 Albion Road</td>
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<td>Edinburgh</td>
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Phone: 0131 475 2350  
Email: lcil@lothiancil.org.uk  
Website: www.lothiancil.org.uk

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<td>Talbot Cottage</td>
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Contact: Rhona McCallum  
Phone: 08451 555555 or 08451 460705  
Email: directpayments.service@fife.gov.uk  
Website: www.fife.gov.uk/atoz  
(Click on ‘D’, then the ‘Direct Payments Support Service’ link.)

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<tr>
<th>Glasgow</th>
<th>Glasgow Centre for Inclusive Living</th>
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<td>117-127 Brook Street</td>
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<td>Bridgeton</td>
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Phone: 0141 550 4455  
Email: gcil@gcil.org.uk  
Website: http://www.gcil.org.uk

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Phone: 01463 224740  
Email: enquiries@dpcaledonia.org.uk  
Website: www.dpcaledonia.org.uk
Highland Council  
Kinmylies Building  
Leachkin Road  
Inverness  
IV3 8NN

Direct Payments Support Officer: Gail MacMillan  
Phone: 01463 703536  
Email: gail.macmillan@highland.gov.uk

Inverclyde Council  
10-16 Gibshill Road  
Greenock  
PA15 2UP

PA Advisor: Kathleen McGhee  
Phone: 01475 714 350  
Email: kathleen.mcghee@inverclyde.gov.uk

Strone Office  
1 Aberfoyle Road  
Greenock  
PA15 3DE

Contact: Iseabail Howat  
Phone: 01475 714 600  
Email: iseabail.howat@inverclyde.gov.uk

Moray  
Direct Payments Caledonia  
Unit 5 Chanonry Business Centre  
2 Chanonry Road North  
Chanonry Industrial Estate  
Elgin  
IV30 6NB

Phone: 01343 552307  
Email: dp.caledonia@moray.gov.uk  
Website: www.dpcaledonia.org.uk

North Lanarkshire  
North Lanarkshire Council  
Social Work Department  
Scott House  
73-77 Merry Street  
Motherwell  
ML1 1JE

Contact: Morag Dendy  
Phone: 01698 332 075  
Email: dendym@northlan.gsx.gov.uk

Midlothian  
See East Lothian
<table>
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<tr>
<th>Orkney</th>
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Contact: Olivia Tait  
Phone: 01856 870 777  
Email: ilproject@tiscali.co.uk

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<tr>
<th>Perth and Kinross</th>
<th>Perth and Kinross Direct Payments Support Agency</th>
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Contact: Annette Summersgill  
Phone: 01738 567 076  
Email: annette.summersgill@pkavs.org.uk  
Website: www.pkavs.org.uk

<table>
<thead>
<tr>
<th>Renfrewshire</th>
<th>Renfrewshire Council Social Work Department</th>
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<tr>
<td></td>
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<td>30 Seedhill Road</td>
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<td>Paisley</td>
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Contact: Janice Toner  
Phone: 0141 847 4984  
(Advice Line: Tuesday, Wednesday and Thursday, 1.30pm to 4pm)  
Email: Janice.toner@renfrewshire.gov.uk

<table>
<thead>
<tr>
<th>Shetland Islands</th>
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<tr>
<td></td>
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Contact: Dorothy Jamieson  
Phone: 01595 694 696  
Email: sicab@zetnet.co.uk

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<tr>
<th>South Ayrshire</th>
<th>Direct Payments Support Service</th>
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<td></td>
<td>See East Ayrshire</td>
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</tbody>
</table>
South Lanarkshire  South Lanarkshire Council
Direct Payments Development Officer
Floor 9, Council Offices
Almada Street
Hamilton
ML3 0AA

Contact: Karen Frame
Phone: 01698 453 716
Email: Karen.frame@southlanarkshire.gov.uk

Stirling
See Clackmannanshire

West Dunbartonshire  West Dunbartonshire Council
Beardmore Business Centre
9 Beardmore Street
Dalmuir
G81 4HA

Disability Development Worker: Victoria McKenzie
Phone: 0141 562 2327
Email: victoria.mckenzie@west-dunbarton.gov.uk

West Lothian
See East Lothian

Western Isles  Cobhair Bharraigh
Kentangaval
Castlebay
Isle of Barra
HS9 5XL

Phone: 01871 810 906
Email: cobhairbharraigh@waitrose.com

Crossroads Harris
Harris Voluntary Service
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Tarbet
Harris
HS3 3BG

Phone: 01859 502 171
Email: hcvs@scvo.org.uk

Tagsa Uibhist
East Camp
Balivawich
Benbecula
HS7 5LA

Phone: 01870 602 111
Email: tagsa.uibhist@care4free.net
Other information

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PO Box 250
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Email: info@disclosurescotland.co.uk
Website: www.disclosurescotland.co.uk

Independent Living Funds (ILF)
PO Box 7525
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NG2 4ZT
Phone: 0845 601 8815
Email: client.service@ilf.org.uk
Website: www.ilf.org.uk

Mental Health Foundation
Sea Containers House
20 Upper Ground
London
SE1 9QB
Phone: 020 7803 1100
Website: www.mentalhealth.org.uk

Scotland Office
Merchants House
30 George Square
Glasgow
G2 1EG
Phone: 0141 572 0125
Website: www.mentalhealth.org.uk/scotland

Mental Welfare Commission for Scotland
Thistle House
91 Haymarket Terrace
Edinburgh
EH12 5HE
Phone: 0131 313 8777 or 0800 389 6809
Email: enquiries@mwscot.org.uk
Website: www.mwscot.org.uk

Scottish Commission for the Regulation of Care (Care Commission)
The Care Commission
Compass House
11 Riverside Drive
Dundee
DD1 4NY
Phone: 01382 207 100
or 0845 603 0890
Website: www.carecommission.com

Scottish Government
Further information is available on the self-directed support website at www.selfdirectedsupportscotland.org.uk.
The 2009 user’s guide to self-directed support in Scotland, 'Directing your own support', is available at www.scotland.gov.uk/265780.
The summary leaflet, 'A guide to self-directed support in Scotland', is available at www.scotland.gov.uk/265754.