

# Purchasing Guidance

For Carer Support, Individualised Funding (IF), Enhanced Individualised Funding (EIF), Choice in Community Living or Enabling Good Lives (EGL) Personal Budgets

From Monday 18 March, Whaikaha is making changes to its Purchasing Rules to clarify how people can use their disability support funding.

This guidance should help you to understand better how to apply the rules which govern disability funding as well as provide overall guidance.

There are four rules that determine how you can use your funding.

These rules are the same for Carer Support and for Individualised Funding (IF), Enhanced Individualised Funding (EIF), Choice in Community Living or Enabling Good Lives (EGL) Personal Budgets.

The changes will remain in place until we have completed work with disabled people, tāngata whaikaha Māori and whānau to develop long term settings, which will ensure our funding is being spent where it is most needed.

The Purchasing Rules, examples of the rules in action and helpful links can be found at [www.whaikaha.govt.nz/purchasingrules](https://www.whaikaha.govt.nz/purchasingrules).

You can find our frequently asked questions, which will be updated regularly at [www.whaikaha.govt.nz/Q-As-PG-EMS](https://www.whaikaha.govt.nz/Q-As-PG-EMS). This information is currently not available in alternate formats.

## Purpose of disability funding

Disability funding was designed to enable eligible disabled people, tāngata whaikaha Māori and their whānau to live a life with ordinary life outcomes. The funding is limited, but with careful planning, it aims to open up opportunities that support you to live a good life by removing some of the barriers you face.

The funding can also be used to support your wellbeing, your whānau and your primary carer through the purchase of respite options – which gives your primary carer the ability to take a break from their caring role. For a definition of respite, visit our [Respite Explained webpage](https://www.whaikaha.govt.nz/support-and-services/carer-support-and-respite/respite-explained-options-and-services) (and <https://tinyurl.com/2vku3vpc>).

## How Government disability funding works

This Government funded contribution is specific to your disability and is therefore only part of a total life solution. In other words, it does not replace the need for other income to support your life nor is it aimed at improving aspects of your life that are not specific to your disability. You have been allocated and are managing disability support funds, which is different to receiving a benefit or allowance from the Government.

That means day to day living expenses or recreational costs, for example, are considered ordinary life costs and are not covered. When assistance is required for this, the Ministry of Social Development may be able to offer support through [www.workandincome.govt.nz](https://aus01.safelinks.protection.outlook.com/?url=http%3A%2F%2Fwww.workandincome.govt.nz%2F&data=05%7C02%7CRebecca.Haig007%40whaikaha.govt.nz%7C56b7733414074172975a08dc48af236f%7Ce40c4f5299bd4d4fbf7ed001a2ca6556%7C0%7C0%7C638465165397863230%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=JQ71ENEVpLJdQxIdDiJYFHmCoVuMUudkdnERJCLggz0%3D&reserved=0). It is recommended that you chat to them to understand if there are any benefits or allowances you may be eligible for, in addition to your disability funding.

## Purchasing rules

Here are the rules, a brief explanation, and some helpful questions to ask yourself when you are considering the rules in relation to a purchase.

### **Rule one**: It helps you live your life or makes your life better

Your funding is individually allocated to you for a specific purpose which was discussed with you by your Needs Assessment Service Coordinator (NASC) or Enabling Good Lives (EGL) team.

Q: Does this purchase relate to the purpose of your funding?

### **Rule two**: It is a disability support

The purchase must be specific to your disability, meaning you would not need the item or support if you did not have your disability.

Q: Is this purchase specific to my disability?

### Rule three: It is reasonable and cost effective.

The purchase is cost effective, reasonable and fits within your budget. This doesn't always mean the cheapest option. Cost effective means the purchase will give you a good outcome without costing a lot of money.

Q: Thinking about your total budget, does this purchase make good use of the allocation on something that will make a lasting impact?

### Rule four: It is not subject to a limit or exclusion

What we mean is that the purchase fits within your allocated funding. In other words, you can afford it under your budget, it’s legal, it is not funded somewhere else, for example, like a grant or other government funding, and it stays within good employment practices (where to get help with employing people is explained below).

Q: Is this the best way to fund this purchase?

For more information on the rules specifically, please read our Whaikaha policy document on the Purchasing Rules at [www.whaikaha.govt.nz/rules](http://www.whaikaha.govt.nz/rules).

## Making a plan

Having a plan will support you to make good purchasing decisions and have meaningful conversations, when needed, around what you want to spend your allocation on with your host. It is there to support your decision making.

This is your plan. It should help you identify how your funding can be used to support you to achieve the outcomes you want. As mentioned above, when you first start IF and EIF, your host will work with you on an initial Individual Service Plan (ISP). Ongoing, if or when your desired outcomes change, you can review this plan and possibly make changes to keep up with where you are at in your life. If you are managing an EGL personal budget, you would review and discuss your plan with your connector.

If you don't already have a plan developed, then discuss with your Connector how you could create a plan that reflects your current outcomes. You can find more information at [EGL Connectors / Kaitūhono - Enabling Good Lives](https://www.enablinggoodlives.co.nz/enabling-good-lives-sites/enabling-good-lives-christchurch/meet-our-independent-facilitators/) (and <https://tinyurl.com/5cmfud9y>).

## Individual Service Plans (ISP)

As part of your set up on to IF or EIF you will be asked to complete an Individual Service Plan (ISP) with your host. This is a good opportunity to think about how you want to use your budget. Everyone’s situation is different and therefore the best way to use your disability funding will be different too. Your ISP will provide the basis to which your Host will advise you when you make each claim.

If you are managing an EGL personal budget, the individual plan and purposes for support funding will have been discussed with your EGL site before the budget is put in place.

Ongoing, the best way to ensure you continue to use the funding within its intended purpose and to minimise frustrations when you make a claim is to be clear on your plan and apply the rules in this guidance before you make a purchase.

## Guidelines in action

A good way to understand the rules is to see them applied to practical examples. Below we have some examples of how the guidance can be applied to real-life situations for IF/EIF/EGL personal budgets.

### Example one

Joelene has an allocation for Personal Care and Respite. She has a support team which she has employed and purchased technology to manage the admin. Joelene lives with her whānau. One outcome in the plan she discussed with her Host, is to spend one weekend a month away at an Air BnB.

She plans to use her Respite budget to pay for the cost of her support worker to stay with her. All other accommodation and transport costs will be covered by other income.

This way of using the funding fits with the rules because it:

* is individualised
* helps achieve an outcome
* is included in the plan
* is within the purpose of the allocation

### Example two

Billie is keen to pursue her goal of becoming a photographer. She has been attending regular photography classes but requires some software that helps with her sight disability. Billie uses her EGL Personal Budget, which includes her Community Participation funding, to purchase the software

Billie is applying rule two: her disability limits how she can access information, the software will allow her to participate in the recreational activity independently.

This way of using the funding fits with the rules because it:

* makes it possible to access information;
* makes it possible to participate on an equal basis;
* there are some more costs involved in taking up the mainstream opportunity, because of disability.

## What can you not use the funding for

Anything illegal, alcohol, tobacco (or related products) or personal income, gambling, anything that is not a cost related to disability and would be considered something that every citizen has to pay for, or:

* All purchasing of items as a form of delivering respite. (Including, but not limited to, consumer electronics, sporting or recreation goods that may reduce the need to take a break.)
* All self-care services such as massages, pedicures and other appearance or therapeutic care.
* All expenses, that are not a necessary part of supporting the disabled person, where those expenses are intended to be part of providing respite.
* Travel related costs for disabled people, whānau, and/or persons providing support, including:
* Accommodation;
* Domestic and overseas travel;
* Food.

You are not able to buy a support when funding for that support has been turned down by (or on behalf of) the responsible government agency or where you may have to wait, including for extended periods, to be able to access the service.

## Employing support workers

If you are employing support workers, you must follow good employment practices and meet all legal employment obligations. Talk to your Host about what is required.

## Role of Individualised Funding (IF) Hosts in Purchasing

Hosts are there to support you to make good use of your funds and budget. They are not the gatekeepers of your funding. They will work with you to:

* ensure that your purchases and supports are relevant to your personal situation;
* ensure that the purchase doesn’t fall outside of the purchasing guidelines;
* support you to revisit your plan as your needs change
* provide advice and guidance.

Please note that you do not need a host to manage your Carer Support Funding, and some EGL Personal Budgets are not managed through Hosts either.

## Where to go for help?

If you have any further questions, the first place to go is your Host or to your EGL team. IF Hosts are organisations that Whaikaha contracts to support people using IF and should provide you with an easy way to understand how to use your IF and support you with all the paperwork required, for example, to employ a support worker.

They will know your specific situation and are there to advise and coach you. They can assist you to look at your plan and whether the support and funding you are choosing fits within this and the purchasing rules.

A full list of IF Hosts can be found at the bottom of our Individualised Funding page at [Individualised Funding | Whaikaha - Ministry of Disabled People](https://www.whaikaha.govt.nz/assessments-and-funding/individualised-funding) (and <https://tinyurl.com/mxzbtksa>).

## Other helpful links

[Carers New Zealand](https://tinyurl.com/4awhntce) can also answer questions on disability funding.

* Website: [www.carers.net.nz](http://www.carers.net.nz)
* Phone: 0800 777 797

[Firstport](file:///C%3A%5CUsers%5Crhaig006%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CINetCache%5CContent.Outlook%5CS5TOEUFP%5CFirstport) (<https://tinyurl.com/rt3uknsa>) is a website set up by Enable NZ and has a lot of helpful information on Disability funding and other sources of funding from within the community.

* Phone: 0800 171 981
* Website contact <https://firstport.co.nz/contact-us>
* You can also contact them using New Zealand Relay Service at [www.nzrelay.co.nz](http://www.nzrelay.co.nz).
New Zealand Relay is a telecommunications service for people who are Deaf, Deaf-blind, experiencing hearing loss or have a speech condition. All NZ Relay calls are strictly private, so information is safe and secure.

## How to contact Whaikaha

If you want to get in touch, you can:

* Email: contact@whaikaha.govt.nz
* Visit our website at: [www.whaikaha.govt.nz/contact-us/](http://www.whaikaha.govt.nz/contact-us/)
* Phone: 0800 566 601
* Text: 4206

Monday, Tuesday, Thursday, Friday: 8am - 5pm.
Wednesday: 9:30am - 5pm

New Zealand Relay is a telecommunications service for people who are Deaf, Deaf-blind, experiencing hearing loss or have a speech condition: [www.nzrelay.co.nz](http://www.nzrelay.co.nz)

**End of information: Purchasing Guidance**

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