

Supplementary: Qualitative Study Characteristics

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
Oliver (1992)	NP Not Linked	Personal Assistance Scheme with Personal Assistance Advisor	PwD employed and managed PAs directly. Advisors provide advocacy work, advice and information about PA schemes and about managing workers and/or employment law. Nearly a quarter required some kind of practical assistance (e.g. help with applying to Independent Living Fund).	England English	Mixed methods including a qualitative study and uncontrolled cross-sectional survey. Face-to-face interviews were conducted	48 RR: 33% (16) PwD only	Not specified	Age range: 32-70 Mean: 45 Female: n = 9 (56%) Ethnic/racial minority: Unknown	Independent Living Fund and the Local Authority	The majority of data reported was raw data using direct quotes. RWC: 1,865
Zarb (1994)	NP Not Linked	Direct or indirect cash payment	Individual workers employed and managed directly by PwD using a direct payment (i.e. paid directly to an individual by either a local authority or the Independent Living Fund) or indirect payments (i.e.	England English	Mixed methods including qualitative in-depth interviews and an uncontrolled cross-sectional survey	131 (Qual) RR: 63% (83) PwD only	Not specified	Age range: 16-64 Mean: 45 Female: 78% (of overall sample, n =65)	Independent Living Fund and the Local Authority	A matrix summary of open-ended responses was reported. The majority of in-depth data reported was

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			payments administered by a third party such as a local disability organisation)		(included open-ended questions).			Ethnic/racial minority: 4% (of overall sample, n = 3)		raw data using direct quotes RWC: 10,925
Malette (1996)	NP Not Linked	Microboard	A micro board is a small non-profit society comprised of family and friends who assist PwD to develop individualized housing and support options. This includes direct funding to PwD to secure housing and support options, freedom to choose where and with whom to live, and autonomy in hiring and defining the nature of personal care and support	Canada English	Qualitative case studies including: Interviews, participant observation , document analysis	3	Physical	Age range: 25-27 Female: 66% (n=2) Ethnic/racial minority: Not reported	governmental funding source - Community Services Branch (CSB), Ministry of Health	Findings are presented as detailed case studies with extensive use of direct quotes. RWC: c.29,197

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Walker (1996)	NP Not Linked	Self-directed personal service (SDPS) program	After a task-based assessment by Long Term Care staff, PwD hire assistants through the SDPS program. A local agency provides payroll support including workers benefits and compensation.	USA English	Qualitative Most interviews conducted face-to-face, but where preferred telephone interviews took place.	90 24% (22) 16 PwD & 6 PAs	Not specified	Age not specified although Medicaid criteria is mentioned (not detailed). It would appear participants are adults.	Medicaid	Data was presented in summary format with direct quotes used extensively. Results word count: 1,848
Holman (1999)	NP Not Linked	Direct payment (DP) Brokerage services	After assessment by the Local Authority direct payment is made to the PwD to secure the relevant services. Although rare, some people with higher support needs use a service broker to support the PwD to use direct payments. An innovative framework (legal	England English	Qualitative Informal and semi-structured.	10 4 case studies involving: 2 DPs, 1 Brokerage user & 1 Trust (Family members and care coordinators were also interviewed)	Physical, intellectual and complex, high-support needs.	Two adults did not specify age. One PwD in 20's, and one 30 years old. Female: 50% (n = 2) Ethnic/racial minority: Not reported	Local Authority Community Care Services	Data presented in 4 cases studies with direct quotes used extensively. Local authority implementation feedback summarised. RWC: c. 15,000

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		User-controlled independent living trust	structure) enabling PwD with high support needs to receive a DP, with decision-making support from dedicated family/friends.			6 local authority representatives were also interviewed.				
Olmstead (1999)	NP Not Linked	Self-determination using Individual Budget	Self-determination is about sharing power and control and negotiating relationships among consumers, families, advocates, providers and support coordinators. Individual budgets are provided to PwD and families to enable decision making, choice, control & individualised supports.	USA English	Uncontrolled cross-sectional survey with open-ended qualitative responses	21 RR: 52% (12) Organisational representatives from 11 States.	Developmental, Intellectual & Mental Health	Not reported	Models varied across states but all were using public funds.	Implementation data was summarised under themes with direct quotes used extensively. RWC: 4,181

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Blumberg (2000)	P Not Linked	Self-directed services utilising Community Service Brokerage & Direct employment of Personal Support Agent	The Community Support broker works as an intermediary between the PwD / family and the range of available supports. Other services involve planning and management of supports. Control is placed with the PwD/family and not formal service agencies.	USA English	Qualitative case study of one individual	1 Self-selected.	Physical	Age: 31 Male	State / federal support dollars	Data is presented in the form of a case study, detailing the story of one persons experience of Self-directed services and Brokerage Service RWC: 1,866
Dawson (2000)	NP Not Linked	Direct Payment (with 3 levels of available support)	Direct payments provided by local authorities to individuals in lieu of community care services with 1) self-management, 2) assisted management (PwD choses agent to assist with managing payment/supports), and 3) assisted by the	England English	Mixed methods including qualitative and uncontrolled cross-sectional survey. People interviewe	48 RR: 48% (23) Some PwD had supports present.	Physical	Not reported	Local authority in lieu of community care services.	Data was summarised under key themes with direct quote used extensively. RWC: 8,465

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			Independent Living Project.		d throughout pilot (some multiple times).					
Glendinning (2000b) Linked: Glendinning (2000, 2000a)	P Linked: 2 additional qual. titles – 1 P and 1 NP	Direct Payment	Local authority social services departments provide PwD with cash (direct payments) with which to employ their own personal assistants (PAs).	England English	Mixed methods: Mainly qualitative but (1 of 3 schemes) conducted a survey providing open-ended qualitative responses. Face-to-face interviews with PwD and focus groups with PAs.	58 98% (57) 44 PwD 13 PAs	PwD with more complex support needs were invited to participate.	Age Range: 18-65 Details of respondents not reported.	Local authority social services department	Data was summarised with extensive use of direct quotes sourced across several titles. RWC: 7,067
Leece (2000)	P	Direct Payment	A payment made by a local authority to an individual whom it	England English	Qualitative open-ended user	19 RR: 68%	Physical and Sensory (1)	Of those who provided details	Local Authority Communi	Data was summarised with

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	Not Linked		has assessed as needing community care services. The local authority makes the payment instead of arranging the assessed service.		satisfaction postal survey, completed anonymously	(13 / 11 eligible ^Δ) 4 provided detailed qual. feedback to the draft findings but not to the original survey.		Age range: 21 – 62 Female: 64% (N = 7) Ethnic/racial minority: 9% (n = 1)	ty Care Services	extensive use of direct quotes. ^Δ Data from 2 respondents who did not receive DP was excluded. RWC: 1,583
Pearson (2000)	P Not Linked	Direct Payment	Local authorities make cash payments to service users with physical and sensory impairments and learning difficulties under the age of 65. The majority of respondents received the payment directly, rather than through an intermediary.	UK: England and Scotland English	Qualitative Face-to-face interviews	100 RR: 35% (35)	Physical and Intellectual	Age range: 25-60 Female: 40% (n = 14) Ethnic/racial minority: 0% (n = 0)	Local authorities	Data summarised with occasional use of direct quotes. RWC: 2,245
Witcher (2000)	NP	Direct Payments and	A direct payment is money paid by the local authority directly	Scotland English	Qualitative.	31	5 Physical & Sensory	All adults	Local Authority	Data was presented in various

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	Not Linked	Indirect payments (via voluntary organisation)	to a PwD whom it has assessed as needing community care services. The local authority makes the payment instead of arranging services. In practice, recipients often employ their own Personal Assistants (PAs) but this is not a requirement.		Semi-structured interviews. Methods adapted in response to assessed support needs, as required.	12 PwD 8 professional 4 local organisation reps. Data from 7 PwD excluded as not in receipt of DP	3 Physical 3 Learning 1 physical and learning	Ethnic/racial minority: 0% (n = 0)		ways. 1) Summary of findings, 2) 'Pen Pictures/Vignettes', 3) Summary with extensive use of direct quotes. RWC: 14,452
Smith (2001)	NP Not Linked	Person-centred supports	Person-centred supports whereby a budget is determined based on a needs based resource allocation system. The budget is attached to an individual not an agency.	USA English	Qualitative Case study Face-to-face interviews and focus groups.	One case study involving interviews with dozens of families, self-advocates, direct support workers, providers,	Developmental	Not specified	Medicaid home and community-based waiver	Summary data presented with very few direct quotes used. RWC: 7,535

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						administrators, and other dedicated advocates				
Carmichael (2002) Linked: Carmichael (2001) Evans (2002)	P Linked to 2 additional titles - NP	Direct Payment	Direct Payments enables PwD who need assistance with a range of daily living activities to buy their own support. PwD can choose and control their own support arrangements. Authorities made contractual agreements with third party organisations who oversaw the money on behalf of PwD	England English	Mixed methods including - User survey, A survey of social services staff, one-to-one interviews, cost comparison ,participant diaries, survey of 5 independent DP support orgs, literature review	Unclear – multiple stakeholders representing work with 71 PwD using DPs	Physical (50), Learning Health (4), Older person (2)	Not reported	Local Authority	Data were summarised with extensive use of direct quotes throughout. RWC: 2,113
Conroy (2002)	NP	Self-determinati	Three pilots with varying degrees of	USA	Mixed methods	112 (Overall)	Mental Health	Average age: 25 (I)	State funds	Data was presented in

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	Not Linked	on pilot projects	intermediary and fiscal coordination. Pilot 1 recruited an in-house coordinator to support the PwD and family in developing a budget and plan. Pilot 2 used existing staff for fiscal support and used service coordinators (sometimes private consultant) for planning. Pilot 3 used 10 independent service brokers to provide a menu of needs-led services. Consultants provided training to PwD and brokers.	English	Including: face-to-face interviews, focus groups, telephone interviews & before and after controlled study.	82 (I) 30 (C) RR: 68.8%	(including various secondary 'major' disabilities)	Female (I): 29%, n=24 Ethnic/racial minority (I): 46%, n=38	were used on a pilot basis (outside the standard federal waiver program – to avoid associated rigidity)	various ways including summaries in free text and table format. 'Stories' or vignettes were also presented. RWC: c.7,607
Eckert (2002) Qual: Phillips (2002, 2006) San Antonio (2003, 2005, 2007)	NP Linked: 15 additional titles including 6 qual. (2 P & 4 NP)	Cash and Counseling	Provides PwD a monthly allowance to hire workers of their own choosing, and to purchase care-related services and goods (within state guidelines). Designated	USA English	Mixed Methods including: Face-to-face and telephone interviews at 2 time points. ('06)	59 (2002) 57 (2003) 58 (2005) 90 (2006) 16 (2014) Total (280 – 36)	Physical, sensory, intellectual, developmental, dementia	Of 40 eligible PwD: Age-range: 20-85 Female: 55% (n =22)	Medicaid	Data for PwD and carers was presented as individual case studies with extensive use

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Simon-Rusinowitz (2014) Quant: Foster (2003) Dale (2004, 2004a, 2005, 2007) Lepidus (2005) Brown (2007) Carlson (2007) Shen (2008)	and 9 quant. (3 P & 6 NP)		representatives (family / friends) can help PwD to make care-management decisions.		Face-to-face interviews ('02, '03, '05) Telephone interviews ('14) Randomised controlled before/after study.	(ineligible participants) =244 40 PwD 204 Staff		Ethnic/racial minority: 50% (n = 20)		of direct quotes. ('02, '03, '05) Summary implementation data presented for the staff interviews with extensive use of quotes in ('14) title. RWC: 134,260
Young (2003)	P Not Linked	Self-directed care	After self-identifying as capable to self-direct, PwD undergo an assessment of need by a case manager. Case managers allot a number of monthly hours and also provide information. PwD hire, train and supervise the providers.	USA English	Mixed methods including qualitative case studies, document reviews & telephone satisfaction survey.	Qual: 30 cases involving 86 in-depth interviews including 28 PwD, 30 individual providers	Not specified	Age-range: 29-72 (mean 49.3) Female: 69% (n = 21) Ethnic/racial minority: 16%	Medicaid	Data was presented in various ways including summaries in free text and table format. Sizeable direct quotes were used occasionally

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						and 24 case managers		(n = 5)		Results word count: 1,905
Breda (2004)	NP Not linked	Personal Assistance Budget (Persoonlijk e-Assistentie budget)	Introduced to enable social integration. After an application and assessment report prepared by multi-disciplinary team, funds are made available to PwD to purchase the desired support in their own home situation. PwD have the ability to recruit care assistants themselves and act as their direct employer.	Belgium Dutch	Mixed methods including qualitative case studies and an uncontrolled cross sectional survey.	15 cases involving 60 interviews (- 6 ineligible participants) 9 cases Family members, friends, carers, PAs, org. reps. Contributed	Of 9 adult PwD: 4 Physical, 3 Mental Health, 2 Sensory or autism	Of 9 adult PwD: Age range: 29 – retirement age (mean = 36) Female: 44% (n = 4) Ethnic/racial minority: Not reported	Flemish Fund	Individual case studies were presented. Data summaries were also provided under key themes. Both used direct quotes extensively. RWC: c. 19,000
Jordan (2004)	NP Not Linked	Direct Payments	Not outlined	England English	Cross-sectional survey with open-ended questions.	150 RR: 50% (n = 75)	Commissioning organisations focus on people with cerebral	Directors of social services in local authorities	Local Authorities	Implementation data was presented in summary format with direct quotes

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							palsy but references made to intellectual and mental health also.			used extensively. RWC: 1,329
Stainton (2004)	P Not Linked	Direct Payment	PwD become the employers/contractors, in most cases using their DP to recruit and hire personal assistants (PAs) to provide the required support. As such, they take on all responsibilities related to that role, such as insurance, tax deductions, etc. Direct payments can be used for all eligible community care services except long term residential care.	Wales English	Qualitative 10 pilot interviews were conducted to identify themes. Followed by 23 in-depth interviews.	50 (+10 pilot interviews) RR: 50% (n= 25) (-2 ineligible = 23 (+ 10 pilots = 33)	Majority physical	Age range: < 65 Female: Not reported Ethnic/racial minority: Not reported	Local Authority	Data was summarised with extensive use of direct quotes RWC: 4,270
Emslie (2005)	NP	Individualised	The intervention aims to enable PwD to live	Australia	Qualitative face-to-face	110 PwD or family	Full sample of PwD:	Full sample of PwD:	Department of	Data was summarised

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	Not linked	planning and support	as citizens in the community and to tailor disability and other supports to their needs. Funds are allocated to PwD and their families / significant others rather than specific programmes. A standard 'Regional Equity Formula' is used to assign an amount. Facilitation varied between dedicated support roles and capacity building as part of usual work.	English	interviews with 102 PwD plus 8 written submissions. Plans were reviewed for 71 PwD. Communication needs are met on a needs-led basis.	(-23 ineligible = 87 257 organisational / community reps.	41% intellectual, 21% physical, 15% autism, 13% ABI, 8% Neuro and 1% sensory	Age range: 3 – 64 (Mean 28.8) Female: 40% (n=44) Ethnic/racial minority: 0% (n=0)	Human Services	under key themes with extensive use of direct quotes. Implementation data was summarised using free text and tables. RWC: c.27,000
Rosenberg (2005)	NP Not Linked	Managed care programme with 'Self-Directed Supports' option	Self-Directed Supports is a consumer-directed service provision scheme in which control over specific services like supportive home care, respite care, and transportation rests with the	USA English	Qualitative focus groups with PwD, managers, Inter-disciplinary Teams, and org. staff.	14 focus groups with approx. 85 in total.	Physical , intellectual and developmental	Not reported	Medicaid	Focus group data was summarised under key themes with extensive use of direct quotes. RWC:

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			PwD and their loved ones, to a much greater extent than with conventional agency-directed services.							12, 582
Butler (2006)	NP Not Linked	Private Hire	“Private hire” describes an arrangement whereby families of PwD choose to become employers and hire staff to support their adult sons or daughter. Families receive funding from Government to directly employ at least some of their own supports as opposed to using agencies to do this for them.	Canada English	Mixed methods- Uncontrolled cross-sectional survey (including open-ended responses) and qualitative study (discussion groups and focus groups)	Survey – 177 RR: 42% (n=75) Discussion group / Focus groups (n=40+) Families and support network c.115	Developmental	Of survey respondents: Age range: 18 – 65+ PwD 85% <=34 Female: 44% (n=33) Ethnic/racial minority: Not reported	Government of Alberta’s Persons with Developmental Disabilities (PDD) program	Focus groups / discussion group findings were summarised without use of direct quotes. Open-ended responses (50% of data) were summarised with extensive use of direct quotes. RWC: 6,048
Sanderson (2006)	P	Self-Directed	After a self-assessment to determine likely	England	Mixed methods	31	Not specified	Age range: 18-61	Local authority	Data were presented in

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	Not Linked	Support using an Individual Budget	amount of funds and the development of a support plan, a PwD has a number of options to manage the budget. PwD can have their money as a direct or indirect payment, or their care manager could purchase a service on their behalf, or they could ask a provider to keep their money as an individual service fund.	English	including uncontrolled before and after survey and qualitative case studies	RR: Unknown				various forms including summaries with extensive use of direct quotes. Three case studies were also presented. RWC: c. 2,176
Speed (2006)	P Not Linked	Direct Payment	The PwD becomes 'the service purchaser' which enables them to control the use of their care/support money with full budgetary power. More recently this has been enhanced by the creation of the individualised budgets scheme.	England English	One qualitative self-selected case study	1	Physical	Age: Unknown Male	Local Authority	Data is presented as a case study, under key themes. It is written in the first person. RWC: c. 2,600
Alakeson (2007)	NP	Self-Directed	Each PwD is given control of an	USA	Qualitative case studies	Undisclosed	Mental Health	Not reported	Medicaid and State	Data is summarised

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	Not Linked	Care (SDC) using an individual budget	individual budget with which to purchase goods and services to meet his or her needs. These supports are of their own choosing rather than ones that are chosen on their behalf, and away from providers with whom they do not want to work.	English	involving 3 States. Structured interviews were conducted with PwD, Staff and State Officials.	number of PwD. 46 interviews with org. staff, policy-makers, academic experts, consumer advocates and provider reps.			general funding in 1 of 3 States	under key themes with minimal use of direct quotes. RWC: 1,134
Caldwell (2007) Linked: Caldwell (2005)	P Linked: 1 additional Qual. title - NP	Consumer Directed Supports with individualised budget	The State provides an individualised budget to PwD living at home with their families. Service facilitators, employed by the state, assist families with developing service plans and coordinate payments for approved services by the state	USA English	Mixed methods including survey of 294, where qualitative study participants were recruited. Face-to-face interviews	9 PwD with proxy respondents for all cases. Two PwD participated jointly with proxy	Intellectual and developmental disabilities	PwD: Age range: 19-47 Female: Not reported Ethnic/racial minority: 33% (n=3)	Illinois Home Based Support Services Program	Data was summarised with extensive use of direct quotes throughout. RWC: 3,377

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					were conducted					
Dimitriadis (2007)	NP Not Linked	Direct Payment	After an assessment of need, an agreed amount of funding is transferred monthly to a PwD or support person to enable the person to use the funds to purchase supports in line with an agreed plan. PwD is accountable for the budget, which they self-manage. They also monitor the quality of supports and services.	Australia English	Mixed methods. Qualitative interviews, Cross-sectional surveys, & Secondary data analysis	25 RR: 40% (N = 10) (-1 ineligible = 9 in total) 4 PwD & 5 proxies	5 physical, 1 sensory, 4 intellectual, 1 intellectual and psychiatric	Age range: 32 – 61 Female : 33% (n=3) Ethnic/racial minority: 11% (n =1)	Department of Human Services, Disability Services	Data was summarised mainly by free text with extensive use of direct quotes. Tables were also used to summarise certain themes. RWC: c. 10,500
Adams (2008)	NP Not Linked	Direct Payment Scheme	Direct Payment recipients are placed in the role of employers allowing PwD to receive funding to make their own arrangements for accessing support, rather than using the services provided by their Local Authority	England English	Mixed methods Uncontrolled cross-sectional survey (with open-ended qualitative questions included). Face-to-face	7539 RR: 7% (n=526)	242 (46%) physical / long term illness, 11 (2%) sensory, 42 (8%) learning, 9 (2%) mental health, 114 (22%)	Age range: 18-85+ (89%) Female: 58% (n = 305) Ethnic/racial minority: 12% (n =63)	Local Authority	Data were summarised under key themes with extensive use of direct quotes. (sometimes quantifying responses due to the

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					interviews conducted		elderly, 108 (21%) carer in receipt of DP			large numbers) RWC: c. 3,500
Daly (2008)	P Not Linked	Individual Budget (IBs)	IBs are an extension of Direct Payments bringing together various existing funding streams (Community care purchasing budgets, Community equipment budgets, Supporting People funding, Disabled Facilities grants, Independent Living Fund, Access to Work) in order to permit social care users to construct care packages to suit their needs and provide them with the outcomes that they wanted.	England English	Qualitative action research. An iterative process whereby researchers interviewed PwD multiple times. Individual and group data collection took place	44 RR: 68% (n=30)	22 (73%) Learning disability, 7 (23%) Severe physical disability, 1 (3%) enduring mental health need	Age range: 16-50+ Female: 37% (n = 11) Ethnic/racial minority: Not reported	Local Authority (Various existing funding schemes)	Data were summarised under key themes with extensive use of direct quotes. RWC: 1,945

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Dinora (2008)	NP Not Linked	Consumer-directed (CD) personal assistance services	PwD can direct personal assistance, respite, and companion services. The PwD is the employer of record for their workers; meaning they hire, manage, and fire their own workers (including family members). A fiscal intermediary is responsible for payroll functions.	USA English	Mixed Methods: Cross-sectional survey (including open-ended qualitative questions)	783 RR: 19% (n=145)	Physical, Developmental, Mental Health	Age range: 18-75+ Female: 47% (n = 68) Ethnic/racial minority: 22% (n = 10)	Medicaid	Data were summarised under commonly occurring themes and then quantified. Direct quotes were used sparingly. RWC: 556
Glendinning (2008) Linked: Qual: Glendinning (2009, 2011) Rabiee (2009) Quant: Jones (2012) Netten (2012)	NP Linked: 5 additional titles including 3 qual. (2 P & 1 NP and 2 P) and 2 quant. (2 P)	Individual Budgets (IBs)	IBs bring together the resources from a number of different funding streams. PwD should have a greater role for self-assessment; greater opportunities for self-definition of needs and desired outcomes; and increased opportunities for PwD to determine those outcomes are	England English	Mixed method involving: Qualitative in-depth interviews with multiple stakeholders Randomised	Qual: 130 (Glen. '08) 14 (Rabiee '09) Staff interviews included: 13 IB leads, 11 training & dev't, 4	Of 144 PwD: Physical / sensory 26% (n=37), Intellectual 29% (n = 42), Mental health 16% (n = 23) Data from older people	Of 144 PwD: Average age: 18-84 Female: Not reported Ethnic/racial minority: 8% (n=12)	Funding was sourced from various funding streams and this varied between the 13 study sites. Types of	Data from PwD and implementation data were summarised under key themes with extensive use of direct quotes throughout RWC: 27,364

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			achieved. PwD should know how much money they will receive, how much services cost, and they should be offered support in planning.		controlled trial 91% completed face-to-face. 9% by telephone.	funding stream leads, 1 Occ. Therapist, 23 managers Total 144+52 =196	(n=42) with no evidence of lifelong disability excluded.		funding streams included 'Access to work' & 'Independent Living Fund'.	
Homer (2008)		Self-directed Support (SDS) using a Direct Payment and other funding streams	SDS is support that is purchased directly by clients using funds from a variety of public sources, including (direct payment, free personal care, supporting people, health, disabled living allowance, independent living fund, access to work, disabled student allowance), which is sometimes brought together into a single pot.	Scotland English	Qualitative case studies involving PwD and their informal carers where appropriate	24 case studies involving 18 PwD and 12 informal carers (-3 ineligible) = 27	All 24 cases: Physical 54% (n=13) Learning 21% (n=5) Multiple 17% (n=4) Mental health 8% (n=2) Dementia 8% (n = 2)	All 24 cases: Age range: 8-80 Female: 67% (n=16) Ethnic/racial minority: 4% (n=1)	Local Authority (Various existing funding schemes)	The data is summarised using direct quotes extensively. RWC: 15,385

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Lord (2008) Linked: Lord (2006)	P Linked to 1 additional title - NP	Individualised funding	A funding allocation to individuals and/ or families by government (in contrast to block funding to agencies) on the basis of the person's specific disability related needs and support requirements, enabling the person to acquire services and supports of their choice. Funding agreements determined by policy are used and typically include various funding levels as well as funding limits.	Canada English	Qualitative case study design including document analysis (support plan, budget etc.), and face-to-face interviews with families.	4 case studies involving 130 files & 18 families (-1 ineligible) = 17.	Of all 18 families: Developmental 98%, Psychiatric/mental health 40%, Physical disability 38%, and Autism 19%	Of all 18 families: Age range: 9-82 (mean =36) Female: 50% (n = 9) 18 countries represented (English as primary language 93%)	Multiple government sources	Data were summarised under key themes with occasional use of direct quotes. RWC: 2,856
Shaw (2008)	NP Not Linked	Direct Payments	Direct payments are money given to an individual, by social services, to buy the support that they have been assessed as needing. An individual can take this payment instead	England English	Mixed methods: using a series of cross-sectional surveys including qualitative	28 (Respondents of scoping survey) RR: 71%	Deafblind	Of 20 DP users: Age range: Not reported Female: Not reported	Local authority	Qualitative data was summarised using tables and free text with extensive use of direct quotes.

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			of using a service provided by social services. Direct payments can be used to pay for a range of assessed needs.		open-ended questions and space for comments	(n = 20 – using a DP)		Ethnic/racial minority: 5% (n=1)		RWC: 3,457
Coyle (2009) Linked: Coyle (2011)	P Linked to 1 additional title - P	Individual Recovery Budget	A recovery budget for this project meant a payment that can be used by the service user to acquire or purchase an item/service/access that would enhance their life, meet agreed goals and contribute to their place within their community.	England English	Qualitative narrative case studies involving face-to-face individual interviews (twice) and focus groups (twice).	13 7 PwD, 1 broker & 2 focus groups with staff members (5 people in total)	Mental Health	Age range: Not reported Female : 15% (n = 2) Ethnic/racial minority: Not reported	Local Authority	Data are summarised under key themes with extensive use of direct quotes. RWC: 12,855
Rogers (2009)	NP Not Linked	Self-Directed Support	Self-directed support aims to make PwD more socially included by allocating money to enable active participation as citizens and partners in the process of designing support plans. Allocation is based on an	England English	Case studies using mixed methods including qualitative interviews, secondary data analysis	18 RR: 94% (n=17) 4 PwD, 2 carers and 11 staff	Mental health (n =6) Physical (n=2)	Of 6 cases: Age range: Not reported Female : 67% (n=4) Ethnic/racial minority: Not reported	Local Authority using a pooled budget for social care within mental health.	Data are summarised under key themes with extensive use of direct quotes. RWC: 2,896

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			assessment of that focuses on support recovery outcomes such as managing safety, activities of daily living and accessing the community.		and a survey.					
Sayles Wallace (2009)	NP Not Linked	Participant direction	Participant direction allowed recipients increased decision-making authority over Waiver services. Where PwD were not ready and able to take additional responsibility for management of those services dedicated representatives (when chosen by the individual with a disability) were able to exercise decision making authority on the individual's behalf.	USA	Mixed methods involving a scoping survey and pilot interviews & Qualitative case studies using telephone interviews, with opportunity to preview questions	89 families surveyed Current study: Subset of 8% n=7 PwD (from 6 families)	Intellectual/ cognitive; autism; sensory; physical disability; mental health	Age range: 25-45 Female : 29% (n = 2) Ethnic/racial minority: 14% (n=1)	Medicaid Home and Community Based Waiver	Data were summaries under key themes with extensive use of direct quotes and real life examples. RWC: 13,333
Eost- Telling (2010)	NP	Personal Budget	Following a self-assessment questionnaire and use	England English	Mixed methods including:	179	Mental Health	Of 179: Age range:	Various: Local Authority	Data were summarised under key

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
	Not linked		of a resource allocation system, an allocation is made based in need. Personal budgets can be delivered and managed in a number of flexible ways to best suit the PwD, including direct payment, payment managed by a dedicated representative, payment to a trust acting on behalf of PwD, use of intermediary service to manage payment, managed by service provider as an individual service fund, or managed by the council on behalf of the PwD.		Qualitative study & uncontrolled cross sectional survey and secondary data analysis	RR: 27% (n = 48) 11 PwD 37 (practitioners and brokers)		18-79 Female: Not reported Ethnic/racial minority: Not reported	, Disabled facilities grant, Supporting people, Access to Work, Independent living fund, Integrated Community equipment services	themes but much of the data were sizeable direct quotes RWC: c. 23,500
Kinnaird (2010)	NP Not Linked	Personalisation using direct payments	Personalisation - the umbrella term that describes an individual having choice and control	Scotland English	Mixed methods including Qualitative interviews	12 case studies involving 12 carers of PwD	Dementia	Of 12 cases: Age range: 60-80+ Female:	Social work department but can also	Individual case studies were presented as well as

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			over the shape of their support along with a greater emphasis on prevention and early Intervention. Direct payments (the main approach used) - money in lieu of services organised by a social work department, allowing PwD with an assessed need the opportunity to arrange their own personalised care.		and a questionnaire for Local Authorities. Face-to-face (81%) or telephone (18%) semi-structured interviews	and 10 social work staff N = 22		67% (n=8) Ethnic/racial minority: Not reported	incorporate additional funding sources including health board monies and the Independent Living Fund.	summarised data with extensive use of direct quotes. RWC: 8,073
Leahy (2010)	NP Not Linked	Self-managed model	For PwD transitioning to adulthood. The PwD and their family/ advocate can choose their supports and activities including how, when and where these are delivered. Activities are based on an individual plan. A service provider acts as an intermediary to facilitate this process, supporting direct	Australia English	Mixed methods including: qualitative interviews & uncontrolled cross-sectional survey	47 PwD RR: 57% (N = 27) + 9 service providers = 36 total	Various	Age range: Not reported Female: Not reported Ethnic/racial minority: 28% of total population (n = 13)	NSW Department of Disability, Ageing and Home Care (DADHC) Community Participation program	Data was summarised under key themes with extensive use of direct quotes and vignettes. RWC: 9,477

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			employment of support workers, and providing information, guidance and administration support as required.							
Priestley (2010) Linked: Priestley (2004) Riddell (2006) Williams (2006)	P Linked: 3 additional titles. 2 – NP 1 – P (Book chapter)	Direct Payments	Direct payments offer cash payments in lieu of traditional services for those eligible to receive community care. They place the recipient in control of the human and financial resources allocated for support.	UK: England, Scotland, Wales and Northern Ireland	Mixed methods including 8 case studies, document analysis, 32 local authority questionnaires, 21 interviews with policy makers And activists and 102 telephone interviews with practitioners.	8 case studies 32 surveys, 21 face-to-face interviews & 102 telephone interviews	Various	Not reported	Local authority	Data were summarised under key themes with extensive use of direct quotes. RWC: 12,666

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
Vinton (2010)	P Not Linked	Consumer and caregiver-directed pilot program	This was flexible state funded programme that included (1) greater choice over type and amount of services, (2) control of funds, (3) choice over hiring providers (including non-Medicaid providers such as family members), and (4) flexible purchasing guidelines. A small number of PwD were self-reliant. Representatives could provide care themselves but some preferred to directly hire a support coordinator for assistance with case management.	USA English	Mixed methods including qualitative focus groups and uncontrolled pre-post survey (including open-ended questions)	44 (+ 3 open-ended survey respondents) = 47 9 PwD, 27 family carers, 2 nonfamily carers, 4 service providers; and 2 support coordinators	Developmental	Of 38 family reps. Providing data: Female: 76% (n=29) Ethnic/racial minority: 34% (n=13)	State funds, along with monies from a developmental disabilities council.	Data were summarised under key themes with extensive use of direct quotes. Results word count: 1,027
Williams (2010)	P Not Linked	Self-Directed Support using	'Self-Directed Support' refers to the new 'operating system' for social care, pioneered by In Control.	England English	Qualitative data based on a one day workshop.	11 (social workers)	Not specified	Not reported	Local Authority	Data were summarised with a combining occasional

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
		Individual Budgets	'Individual Budgets' are any form of 'social support' whereby the person receiving it knows the level of monetary value and exercises choice about how that sum is used (within limitations of safety, legality and meeting needs).							and extensive use of direct quotes. RWC: 1,184
Wilson (2010)	NP Not Linked	Personal Budget	A personal budget is finance allocated to an individual to be used for their care and to enhance their quality of life following a needs assessment. This personal budget can be held by the individual and paid directly into their bank account (a direct payment) to purchase agreed supports. The personal budget can also be managed by the local authority.	England English	Mixed methods: Uncontrolled Cross-sectional survey (with open-ended questions)	735 RR: 28% (n = 203)	Physical, Intellectual, Mental Health	Age range: 18-75+ Female: 69% (n=140) Ethnic/racial minority: Not reported	Local Authority Social Care Fund	Almost all data was reported as direct quotes under the open-ended question. Summary data with use of quotes also reported. RWC: 7,939

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
Campbell (2011)	NP Not Linked	Support Planning & Brokerage using a Personal Budget (PB) or Direct Payment (DP).	<p>The study examined support planning & brokerage by a user-led org. compared to local authority. PwD availed of a PB - an allocation of money from the local authority, to meet a PwD's assessed needs for a given period of time. A PB can be taken as a DP or leave the LA with the responsibility for commissioning the relevant services.</p> <p>With a direct payment an individual elects to receive their personal budget as a cash allocation (into a bank or similar account). They can self-manage the budget or can delegate management to a third party.</p>	England English	Mixed methods involving qualitative interviews at two time points and secondary data analysis.	80 RR Time 1: 100% RR: Time 2: 88%	Physical/sensory, intellectual, mental health, older people	Age range: 18-76+ Female: 56% (n=45) Ethnic/racial minority: 10% (n=8)	Local Authority	Data was summarised without use of direct quotes. RWC: 12,393

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
Hatton (2011)	NP Not Linked	Personal Budget	Personal budget can be taken by an individual as a direct (cash) payment; as an account held and managed by the council in line with the individual's wishes; or as an account placed with a third party (provider) and called off by the individual; or as a mixture of these approaches.	England English	An uncontrolled cross-sectional survey with open space for qual. comments. Available online, in easy-to-read format and as standard paper survey	1,114 PwD 950 carers = 2,064 RR: 41% N=851 (left qual. comments) 417 PwD 434 carers	Aged 16-64: Physical (25%), Mental Health (8%), Learning (17%)	Of PwD: Age range: 16-65+ Female: 61% (n=c. 254) Ethnic/racial minority: 11% (n= c. 46)	Local Authority	The data were summarised using free text with extensive use of direct quotes. Key themes were also summarised using tables. RWC: c. 2,044
Lambert (2011)	NP Not Linked	Personal Budget (PB)	A PB is money allocated to an individual by their local authority to cover their social care needs; aiming to give more choice and control over how their social care needs are met. Of sample 38% opted for	England English	Qualitative in-depth interviews. Staff interviews took place first to build implement	48 PwD/carer 6 staff = 54	Physical, Learning and Mental Health, Dementia	Of PwD: Age range: up to 71+ Female: 52% (n=25) Ethnic/racial minority: Not reported	Local Authority	Data were summarised under key themes with extensive use of direct quotes and case studies throughout

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			a direct payment, 45% decided to leave it to their council or another 3 rd party to commission and arrange services on their behalf (but still retaining choice over how their care needs are met and by whom), while 17% choose a combination of the two		ation context.					RWC: 12,981
Newbrunner (2011)	NP Not Linked	Personal Budget (with various models of delivery described)	Depending on the Local Authority, delivery of PBs were described differently including: Self-directed supports (including PB), Direct Payments, Indirect Payment via a representative, and Commissioned services	England English	Qualitative case studies including: face-to-face interviews, telephone interviews, focus groups, small implementation discussion groups	13 sites RR: 38% (n=5 case studies) involving 30 (PwD/carers) + 40 implementation leads = 70 Note: 39 ineligible	Mental Health and Dementia (only data where disability specified were extracted)	Of PwD: Age range: 18 – 65+ Female: 70% (n=21) Ethnic/racial minority: 23% (n=7)	Local Authority	Data were summarised with the extensive use of ‘personal stories’ and case study ‘positive practice examples’ throughout. RWC: 8,218

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
						people excluded				
Ridley (2011)	NP Not Linked	Self-Direct Supports (SDS)	The range of SDS options included both Direct Payments (DPs) and Individual Service Funds (ISFs), as well as individually tailored local authority services. DPs were clearly the most common SDS option across all 3 test sites. These were either managed directly by the PwD or managed by a 3rd party, usually family members. The second most common SDS option was ISFs arranged with external providers.	Scotland English	Case study approach involving mixed methods including in-depth interviews and secondary data analysis of 132 PwD.	30 qualitative case studies from 3 sites involving 30 PwD/carer and care manager (c. 90) plus 12 stakeholder interview = 102	Learning 33% (n=10), Physical 23% (n=7), Older – over 65 3% (n=1), Dementia 3% (n=1), Multiple disabilities 27% (n=8), Mental health 3% (n=1), Autistic 7% (n=2)	Of 30 PwD: Age range: Unclear Female: 40% (n=12) Ethnic/racial minority: 0% (n=0)	Local Authority	Data were summarised using free text with extensive use of direct quotes and extensive use of vignettes throughout. RWC: 5,373
Secker (2011)	NP Not Linked	Personal Budget	Definition not included.	England English	Mixed methods including uncontrolled cross-sectional	14	Mental Health	Age range: 20-65+ Female: 64% (n=9)	Making Involvement Matter in Essex	Data were summarised under key themes with extensive use of direct

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
					survey (including space for comments), follow up in-depth interviews (n=2)			Ethnic/racial minority: 21% (n=3)	pilot project	quotes / comments RWC: 2,022
Rummery (2012)	NP Not Linked	Self-Directed Support (SDS)	SDS offers a range of options giving service users increased control over more personalised services. SDS aims to <i>empower people and to put the principles of independent living into practice. It enables individuals to direct the care or support they need to live more independently at home and can be instead of, or in addition to, services that might be arranged by their Local Authority.</i>	Scotland English	Mixed methods including uncontrolled cross-sectional survey (including space for comments), and interviews and focus groups	210 RR: 28% n = 59 plus Focus groups n = 8 PwD, 2+6 service providers interviews n = 2 & groups interviews n = 6 Total = 75	Physical 69% (n=40), learning 17% (n = 10), age related disability/illness 9% (n=5) and mental health 5% (n= 3)	Of survey respondents: Age range: 16-65+ Female: 59% (n=35) Ethnic/racial minority: Not reported	Local Authority	Data were summarised under key themes with extensive use of direct quotes / comments RWC: 3,097
Sheikh (2012)	NP Not Linked	Personal Budgets	Not defined	England English	Longitudinal qualitative study	55 PwD in total (46 at Time 1, 26 at	Of 46 Time 1 PwD: Older 54% (25),	Not reported	Local Authority	Data were summarised under key themes with

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
					involving interviews with PwD and service providers, followed by focus groups with frontline practitioners.	Time 2 & 20 (+9) at Time 3. 17 service providers 7 practitioners (- 25 ineligible older people) = 54	Physical / Sensory 28% (13), Learning 17% (8) At time 3 66% of respondents had a disability, while only 33% were older people.			extensive use of direct quotes. It was easy to disaggregate ineligible participant. RWC: 13, 369
Gross (2013)	P Not Linked	Participant Direction	A service delivery model in which the consumer of public benefits (in this study, Medicaid Home and Community Based Supports (HCBS) waiver services) has some level of choice and control (e.g., employer authority, budget authority) over the supports and services received.	USA English	Qualitative case study involving individual interviews, group interviews and document review. 1 interview conducted by telephone,	4 cases studies with 22 respondents. This included 4 PwD and their network of support and case manager.	Intellectual and developmental, Autism, Sensory	Of 4 PwD: Age range: 20-29 Female: 25% (n=1) Ethnic/racial minority: 25% (n=1)	Medicaid HCBS Waiver	Data were summarised under key themes with extensive use of direct quotes. RWC: c. 3,176

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
					the remaining were face-to-face					
Hatton (2013)	NP Not Linked	Self-Directed Support using Personal Budget	The intention of self-directed support is that individuals who need support and their families are told how much money their council will make available to them to meet their needs. The person needing support and those closest to them can then determine how best to use these resources and develop a support plan describing how the person's needs are going to be met.	England English	An uncontrolled cross-sectional survey with open space for qual. comments. Available online, in easy-to-read format and as standard paper survey	2,022 PwD 1,386 carers = 3,408 RR: 29% N=978 (left qual. comments) 488 PwD 490 carers	Aged 16-64: Physical (53%), Learning (34.7%), long-standing illness or condition (29.7%), Sensory (11.2%), Mental Health (1.7%),	Of total sample pf PwD: Age range: 16-65+ Female: 54% 1,089 Ethnic/racial minority: 7% (n=145)	Local Authority	The data were summarised using free text with extensive use of direct quotes. Key themes were also summarised using tables. RWC: c. 3,891
Rees (2013)	NP Not Linked	Self-directed or Self-managed	Self-directed: Funding is provided to an organization that is accountable to funders. The PwD/family/significan	Australia English	Qualitative study involving face-to-face interviews or	48 19 PwD 21 Family members	16 Learning, 16 Physical, 12 Acquired disability, 4	Not Reported	Department of Families, Housing, Community	Data were summarised under key themes with extensive use

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			<p>t other people direct the required types of services & supports, and report directly to the organisation.</p> <p>Self-managed: The PwD/family/significant other people manage the all aspects of the funding, and provide financial acquittals and reports directly to the funding body / government, or do so in consultation with an agency.</p>		telephone interviews.	-10 (6 pwd/4 family) not yet commenced intervention = 38	Psychiatric, Sensory/Speech		Services and Indigenous Affairs	of direct quotes. RWC: c. 11,760
Bola (2014)	NP Not Linked	Personal Budget (PB)	PBs are based on assessed social care needs, but usually only available to people with substantial or critical needs. A PB should allow the service user the ability to plan and purchase their support with the allocated funds. The budget can be used in a variety of	England English	Qualitative study involving face-to-face interviews and focus groups with various stakeholders	49 15 PwD / carer / 28 service providers, 3 commissioners & 3 experts	Mental Health	Not reported	Local Authority	Data were summarised under key themes with extensive use of direct quotes, separated by stakeholder group. RWC: 11,295

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			ways to meet the person's eligible needs for social care.							
Junne (2014)	P Not Linked	3 types of Direct Payment: 1 – direct payment through subsidised workplace 2 – Personal Budget (PB) for PA 3 – 'employment model'	1 – budget users worked in a protected and subsidised workplace and since 2011 have been able to receive a direct payment to pay for the subsidised job themselves, with a small portion free to use 2 – PB for assistant services to aid societal integration 3 - employment model' which enables individuals with a severe handicap to organise their own 24-hour-care	Germany English	Qualitative study involving 23 face-to-face interviews (some in pairs) and 4 telephone interviews.	37 (14 budgets users, 11 care assistants, 9 employees of care providers, 3 administrators/LA)	Various: ranging from serious physical to mental health	Not reported	Local Authority (Länder) within the federal state of Germany.	Data were summarised under key themes with extensive use of direct quotes. RWC:4,625
Buchanan (2014) Linked: Peterson (2014)	P Linked to 1 additional title - P	Individualised funds and shared management, person-centred and	SPS services provide consumers with access to shared management and person-centred relationships with staff, such as a broker,	Australia English	Qualitative document analysis of 473 documents based on 16	16	Mental Health	Mean Age: 46 Female: 56% (n = 9)	A non-denominational community benefit service	Data were summarised under key themes with extensive use of direct

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
		self-directed (SPS) services.	advisor, guide, mentor, or support worker. Shared management requires both consumers and staff to be responsible for managing individualised funds and recovery resources, and staff to support consumers' freedom, responsibility, and accountability in progressing their recovery journey		PwD's individualised funding and hours of support.			Ethnic/racial minority: 7% (n=1)	provider of mental health services	quotes. Tables were also used. RWC: 9,251
Waters (2014)	NP Not Linked	Self-Directed Support using Personal Budget	The intention of self-directed support is that individuals who need support and their families are told how much money their council will make available to them to meet their needs. The person needing support and those closest to them can then determine how	England English	An uncontrolled cross-sectional survey with open space for qual. comments. Available online, in easy-to-	2,679 PwD 1,386 carers = 4,065 RR: 76% N=3,103 (left qual. comments)	Of total sample: Physical (53%), Learning (34.7%), long-standing illness or condition (29.7%), Sensory (11.2%),	Of total sample of PwD: Age range: 16-65+ Female: 57% c. 1,532 Ethnic/racial minority: 7% (n=177)	Local Authority	The data were summarised using free text with extensive use of direct quotes. Key themes were also summarised using tables.

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			best to use these resources and develop a support plan describing how the person's needs are going to be met.		read format and as standard paper survey	c. 2,036 PwD c. 1,067 carers	Mental Health (1.7%),			RWC: c. 1,373
Coles (2015)	P Not Linked	Direct Payment (DP) managed by a third party 'suitable person'	The parents in the research had taken on the role of a 'suitable person' ('SP'), which was a term introduced in England and Wales due to the extension of the DP scheme under the Mental Capacity Act. Parents make decisions about the day-to-day management of care, in their role as 'SP'. However, local authorities effectively maintained the right to counter the PwD's initial decision to delegate to a suitable person.	England English	Qualitative study involving interviews, observation, document & correspondence review	8 PwD represented by 12 parents	Learning disability and complex support needs	Age range: 25-40 Female: 25% (n =2) Ethnic/racial minority: Not reported	Local Authority	Data were summarised under key themes with extensive use of direct quotes. RWC: 2,282
Glendinning (2015)	P	Personal Budget	PBs can be allocated as cash direct payments	England	Qualitative study using	14 dyads	10 learning disability, 4	Age range: 20s-80s	Local Authority	Data were summarised

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
	Not Linked	managed by third party	(DPs), held and managed by the PwD or a third party such as a carer or support organisation, or held by the local authority and used to purchase council-commissioned services on the user's behalf. PB levels are reduced to take account of help given by family carers (so long as they are willing and able to continue providing this).	English	in-depth interviews		older person (2 Stroke, 3 dementia, 1 bi polar)	Female: 43% (n = 6) Ethnic/racial minority: Not reported		under key themes with extensive use of direct quotes. RWC: 2,785
Hamilton (2015b) Linked: Qual: Larsen (2015) Clewett (2015) Hamilton (2015)	P Linked to 5 additional titles - P	Personal Budget	Personal budgets aim to provide 'maximum choice, control and power' over how any funding social care funds allocated to PwD, through the mechanism of a personal budget.	England English	Qualitative in-depth interviews.	53 service users & 18 family carers & 28 Mental Health Practitioners) = 99	Mental Health	Age range: 21-71 (Mean =44) Female: 60% (n=32) Ethnic/racial minority: 13% (n=6)	Local Authority	Data were summarised under key themes with extensive use of direct quotes. RWC: 13,708

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
Hamilton (2015a) Tew (2015)			The funding may be passed over to them or a proxy (as a 'Direct Payment'), or they may be invited to influence the spending of a budget managed on their behalf by a local authority or other organisation.							
Jepson (2015) Linked: Laybourne (2014)	P Linked to one 1 additional title - P	Indirect Payment	Direct payment managed by a third party. If a PwD is considered to lack capacity to consent to make a decision about a DP, a 'suitable person' can be appointed to receive and manage the payments on their behalf. This allows the PwD to have a type of relational autonomy, where another person in their life can make the significant	England English	Qualitative in-depth interviews.	18 PwD & 67 social workers N=85	Dementia	Not reported	Local Authority	Data were summarised under key themes with extensive use of direct quotes. RWC: c. 6,238

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			decisions about a DP for them							
Jones (2015)	NP Not Linked	Individual packages: Supported Living Fund (SLF) and Individual Accommodation Support Packages (IASP)	Both SLF and IASP were recurrently funded, intended to complement informal supports, enabling PwD to create living arrangements to suit their life and preferences, and provided access to paid supports and services. People who used the were not tied to any one service provider or living arrangement, rather the funding was portable throughout NSW, remained with the person and was administered by a service provider of the person's choice. IASP was a recurrently funded package	Australia English	Mixed methods including: Uncontrolled Cross-sectional survey (with open-ended responses) and Qualitative in-depth interviews with PwD, family, managers. Focus groups with support workers	130 RR: 69% 90 (qual. interview s- 30 with PwD)	Intellectual 76.7%, Other 23.3% including specific learning/Attention Deficit Disorder, Autism, Physical, Acquired brain injury, Neurological, Sensory and speech, Psychiatric	Of 30 PwD: Age: 80% < 45 Female: 45% (n =14) Ethnic/racial minority: 3% (n=1)	Department of Family and Community Services, Ageing, Disability and Home Care (ADHC)	Data from all sources were summarised with use of direct quotes throughout. RWC: 21,815

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
Laragy (2015)	P Not Linked	Various Individualised Funding: 1 - Shared Management Model and 2 - Community Living Fund	Shared Management Model (SMM) allowed people to directly employ support workers as long as a service provider held the funds and managed the wages and taxes for an agreed fee. Community Living Fund (CLF) provided support to enable the person to live with their family or live independently in the community rather than in residential care.	Australia English	Qualitative study based on in-depth interviews	11 respondents including: 2 PwD, 3 gov't administrators, 4 CEOs of disability service, 1 support worker & 1 advocate	Cognitive and Physical	Not reported	National Disability Insurance Scheme (NDIS)	Data were summarised under key themes with extensive use of direct quotes. RWC: 1,888
O'Brien (2015)	NP Not Linked	Direct Payment	Direct Payment is a payment that individuals receive to purchase their own support. PwD must set up an individual company in order to receive the direct payment. They are supported by a	Ireland English	Case studies involving mixed methods: Skype (online video-call) interviews, 1 open-	8 (- 1 ineligible) = 7	Physical / Sensory 88% (n=7) Intellectual (n=1)	Age Range: 12 - 64 Female: 14% (n=1)	Health Service Executive	Data were summarised under key themes with extensive use of direct quotes RWC: 6,403

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			disability led organisation with initial-set up, business registration, tax returns etc. An informal support network provides longer-term support.		ended questionnaire and 1 face-to-face interview.			Ethnic/racial minority: 0% (n=0)		
Fleming (2016a) Linked Fleming (2016)	P Linked to 1 additional title - NP	Individualised funding including 3 brokerage models and 1 Direct Payment (DP)	A DP involves funds being given directly to the PwD, who then self-manages this money to meet their individual needs and life circumstances. This may include the employment of a personal assistant to help with everyday tasks and/ or the purchase of services from private, voluntary or community service provider organisations. A brokerage model	Ireland English	4 Qualitative case studies involving document analysis, secondary qual. data analysis, in-depth interviews and a participatory workshop.	44 individuals (20 PwD, 12 staff and 12 advocates)	Intellectual and developmental, physical, sensory, mental health	Of PwD: Age Range: Adults Female: 45% (n =9) Ethnic/racial minority: 0% (n=0)	All 4 pilots funded by voluntary organisation with 2 accessing ongoing funding from the Health Service Executive	Data were summarised under key themes with extensive use of direct quotes. Tables were also used to summarise data. RWC: 5,740

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			provides for a similar amount of freedom for the PwD around choice and control of services utilised, but the broker takes responsibility for administrative tasks, and also offers support, guidance and information to enable the person to successfully plan, arrange and manage their support services or care plans.							
McGuigan (2016)	P Not Linked	Direct Payment (DP)	A DP is a means tested cash payment made to individuals who have been assessed as needing services, in lieu of social service provision. DP allow PwD to avail of care, which they can tailor to their needs, and to source that care themselves rather than	Northern Ireland English	Mixed methods including Qualitative interviews and Cross-sectional survey	317 Proposed sample 10% N = 30 (2 DP users and 28 informal carers implemen	Learning 40% (n=12), physical 27% (n=8), mental health 7%(n=2), 5 older (n=5) (65+) and 3 <18	Of PwD: Age Range: <18-65+ Female: 37% (n = 11) Ethnic/racial minority: Not reported	Local Authority	Data were summarised using free text with extensive use of direct quotes. RWC: 1,851

First Author (year) (linked)	Pub Status (linked)	Program Name	Intervention Description	Country (Language)	Design	N	Type of disability	Sample Characteristics	Funding Source	Type of data presented
			depend upon existing statutory or traditional providers.			ting PB on behalf of family member)				

C – Control / I – Intervention

P – Published in peer reviewed journal / NP – Not published in peer reviewed journal

Linked – Linked to other identified titles / Not Linked – Not linked to other identified titles

PA – Personal Assistant

PwD - Person(s) with a lifelong Disability /Dementia

RR – Response Rate

RWC: Results Word Count

*Data for the minors and the older cohort [65+ (2 sites) / 3-17 years and 60+ (1 site)] were excluded. Older cohort was excluded as there was no way to determine who had a life-long disability and who was receiving age-related home support.

** Uncontrolled pre-post longitudinal study not included. Control only used at time 3.

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