

**TO: EXECUTIVE  
19 JANUARY 2010**

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**PERSONALISATION UPDATE  
(Director – Adult Social Care and Health)**

**1. PURPOSE OF DECISION**

- 1.1 To note the work undertaken to ensure the Council meets its responsibilities in response to the Putting People First Agenda (Personalisation), and to note the outline plans to meet the milestones to March 2011.

**2. RECOMMENDATION(S)**

**That the Executive notes:**

- 2.1 **The progress reports on meeting the milestones and plans for meeting future milestones (Annex A).**
- 2.2 **The Personalisation Update report (Annex B).**

**3. REASONS FOR RECOMMENDATIONS**

- 3.1 The “Putting People First” Concordat set out the shared agreement between Government, Local Government and their partners for how people with additional support needs should be supported. It clearly sets the agenda for change in a number of key areas:
- Choice and control for adults with support needs
  - Information and advice for people with support needs, regardless of who pays for the support
  - Support that promotes independence
  - Universal services
  - All stakeholders working together to shape communities
  - Cost effective, quality, outcome focused support
- 3.2 The Local Authority Circular DH 2008(1), Transforming Adult Social Care (TASC), demands that people be supported to understand the money and community resources available to them and will be encouraged to use these imaginatively to meet their needs. Councils need also to ensure that the supply and type of support that people need and want to buy. Creating capacity in the community and enabling natural support networks are integral planks to this agenda. Bracknell Forest Council approved an approach to personalisation and the associated programme of work including the pilot in summer 2008 which is being funded through a specific grant from the Department of Health.

#### **4. ALTERNATIVE OPTIONS CONSIDERED**

4.1 None

#### **5. SUPPORTING INFORMATION**

##### Personalisation Pilot

5.1 In July 2009, Bracknell Forest Council began a seven month pilot study to test self-directed support for adults who meet the social care eligibility criteria and who would currently receive either services or a direct payment. Self-directed support will enable people and their family or informal support networks to have greater control over the type of support that is provided and the way in which it is delivered.

5.2 Self-directed support and personal budgets are already in place for adults with a learning disability. Although this will not be a new way of working to people who are supporting people with a learning disability, some aspects of the pilot such as testing the new Resource Allocation System will still apply.

5.3 The pilot study is to test an approach to implementing self-directed support in Bracknell Forest.

- Individuals who are eligible for social care support complete a supported self-assessment questionnaire. The completed questionnaire is scored and weighted and the result determines the personal budget amount that the individual is entitled to pay for their support.
- Individuals receive a financial assessment and their contribution to their support costs (if they can afford it) is calculated.
- The individual develops a support plan, with help if needed, which will be agreed by the Council.
- The individual then chooses how they want to manage their budget – this could be via a direct payment to themselves or a third party (i.e. to a trust or a broker), through the personal facilitator working for the Council or a combination of those options.

The Council retains the duty to ensure that people's support plans are keeping them safe and their support needs are being met.

People taking part in the pilot still have access to specialist assessments, advocacy and a social worker if they need them.

5.4 The pilot study aims to test the following areas:

- Experiences and outcomes for people and carers taking part in the pilot, and their carers – in comparison with the traditional approach
- Testing of the personalisation procedures – including self-assessment and the Supported Self-Assessment Questionnaire, the Resource Allocation System, support planning, accessing support and information and review.

- Implications for other services/functions – including social work, occupational therapy, links with health, providers and community and voluntary groups
- Flexibility of support options and capacity within the community - what choices are people making and what supports and activities need to be developed further
- Implications for Council support services – including finance, legal, safeguarding, brokerage and commissioning
- Cost-effectiveness in comparison with standard approaches – need to record costs and estimate traditional cost for comparison

5.5 An evaluation tool for the pilot has been developed. The aim of the evaluation is to identify challenges and improvements associated with implementing the personalisation agenda. The evaluation covers both the developing processes and outcomes of personalisation by identifying key lines of inquiry as follows:

- Experiences and outcomes for people taking part in the pilot, and their carers
- Testing of the personalisation procedures
- Flexibility of support options and capacity within the community
- Implications for Council and other services
- Cost-effectiveness in comparison with standard approaches

The evaluation period is during February to March 2010 with the report available in April 2010.

5.6 The pilot is being carried out by a team of Personal Facilitators that was recruited for the purpose and is being managed by a Personalisation Development Manager.

5.7 The aim is to support a minimum of 40 individuals through the pilot split between care groups as follows:

- 3 older people with Mental Health problems
- 7 people with Long Term Conditions
- 5 people with Mental Health problems
- 25 older people

People selected will include -

- a representative sample of people in terms of the Bracknell Forest demographic, including both new and re-referrals, with varying support needs;
- at least a representative sample of people from BME groups

All people approached to take part in the study will be informed that it is a pilot and they are asked to agree to take part in it..

5.8 The pilot has been accepting referrals for almost 6 months and is currently working with 50 individuals on the pilot and an additional 16 people with a learning disability. 9 individuals have presented their support plans to a panel and have had their budget and plans approved.

## Department of Health Transforming Adult Social Care Milestones

- 5.9 In September 2009 the Department of Health and its partners published milestones with targets for Councils for the implementation of the TASC circular. Appended to this report is the completed milestones document for Bracknell Forest. The milestones will be monitored locally through the Personalisation Programme Board and externally through the regional Transformation Groups.
- 5.10 The Personalisation Communication Strategy and the Corporate Engagement Strategy have action plans to address the milestones to ensure that all stakeholders are informed of the council's progress and have opportunities to contribute to strategic planning. By December 2010 every Local Authority area should have at least one user-led organisation. We are working with local groups to identify options and accessing support from the regional personalisation support team.
- 5.11 The Council has a mechanism (Supported Self-Assessment Questionnaire and Resource Allocation System) to allocate personal budgets. This is in operation for people with a learning disability and is being piloted for people in all other care groups. The evaluation of the pilot will inform the rollout plans and the workforce strategy to ensure that we meet the NI 130 target by March 2011 (that 30% of the people we support have a personal budget and/or a direct payment). This is a challenging target for the Council as a significant proportion of individuals supported do not go on to receive ongoing support from the Council following reablement. Team targets for the numbers of people receiving self-directed support are being set.
- 5.12 The Council have a service, funded by a pooled budget with the PCT, to provide reablement services in order to prevent people, where possible needing ongoing support from the Council. There is a joint board to monitor the impact of the service. Monitoring the impact of preventative services to determine cashable savings is complicated and guidance from Department of Health is awaited.
- 5.13 An Information and Advice strategy for Adult Social Care is in development to ensure that individuals have universal access to information and advice. The front desk system, already in operation, provides a first point of contact for information and advice for all new calls to adult social care. An IT system to host information is currently being investigated.
- 5.14 The Council have commissioning strategies in place for all care groups which are due to be refreshed in the light of personalisation. The strategies are informed by the Joint Strategic Needs Assessment which is refreshed annually. A workshop was held in April to educate providers, from all sectors, about the personalisation agenda and the Council's programme for implementation. A further workshop is planned, in partnership with BFVA, following the pilot. The Community Capacity Building work stream and the internal Development Liaison Group are working to identify needs in the community and to co-ordinate future development work. A workshop will be held in May 2010 to understand the future commissioning requirements based on the aggregated needs of individuals.

## **6. ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS**

### Borough Solicitor

- 6.1 The relevant legal provisions are contained within the report.

### Borough Treasurer

- 6.2 The Borough Treasurer is satisfied that no significant financial implications arise at this time. However, the wider introduction of personalisation could have significant financial implications for individuals and the Council. For example, the introduction of the Resource Allocation System, and the potential redistribution of funding presents a financial risk. The completion of the pilot programme will help to undertake a detailed evaluation and to establish more clearly the financial implications and the potential impact on the budget.

### Impact Assessment

- 6.3 The Personalisation agenda aims to make support flexible and responsive to meet the diverse needs of the community and to ensure that universal services are accessible.

### Strategic Risk Management Issues

- 6.4 There is a Risk Log for the programme which is updated and considered at every Programme Board meeting.

### Other Officers

- 6.5 N/A

## **7 CONSULTATION**

### Principal Groups Consulted

Personalisation Implementation Team  
Personalisation Programme Board  
Departmental Management Team

### Method of Consultation

- 7.1 Meetings

### Representations Received

- 7.3 All recommendations have been incorporated within this version of the report

### Background Papers

Putting People First, December 2007  
LAC 2008 (1) DH Transforming Adult Social Care

Contact for further information

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Personalisation Update Report December 2009 & Milestones