



Meeting of East Renfrewshire Health and Social Care Partnership	Integration Joint Board
Held on	18 March 2020
Agenda Item	8
Title	Implementation of Individual Budget Calculator and Self Directed Support
<p>Summary</p> <p>This report sets out an update on the Implementation of the Individual Budget Calculator and Self Directed Support processes.</p>	
Presented by	Lesley Bairden, Chief Financial Officer
<p>Action Required</p> <p>The Integration Joint Board is asked to note the update and progress.</p>	
<p>Implications checklist – check box if applicable and include detail in report</p> <p> <input checked="" type="checkbox"/> Finance <input type="checkbox"/> Policy <input type="checkbox"/> Legal <input type="checkbox"/> Equalities <input type="checkbox"/> Risk <input type="checkbox"/> Staffing <input type="checkbox"/> Directions <input type="checkbox"/> Infrastructure </p>	

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EAST RENFREWSHIRE INTEGRATION JOINT BOARD**18 March 2020****Report by Chief Financial Officer****IMPLEMENTATION OF SELF DIRECTED SUPPORT****PURPOSE OF REPORT**

1. The purpose of this report is to provide the Integration Joint Board (IJB) with an update on the implementation of the Individual Budget calculator and self-directed support process.

RECOMMENDATION

2. The Integration Joint Board is asked to note and discuss the update on implementation contained in the report
3. The Integration Joint Board is asked to approve the deferment of charging a client contribution until April 2021.

BACKGROUND

4. The Integration Joint Board has received a series of reports, as set out below and detailed at the end of this report, on the process for calculating (adult) Individual Budgets under Self Directed Support legislation.

Adult Individual Budget Process Overview

5. This report provides an update on the implementation of the Individual Budget Calculator and Self Directed Support processes.

REPORT

Preparation for Implementation

6. Prior to implementing the Individual Budget Calculator, outcome-focussed planning training was delivered to all Social Workers and Social Work Assistants as well as Team Managers and Finance Support Officers. Partner agencies, the SDS Forum and Carers Centre, also attended training sessions held on 29th/30th May 2019 and 19th/20th August 2019 for those who couldn't attend the original session.
7. Practice guidance and process checklists were developed and shared with staff to ensure consistency of implementation and equity across the two localities.
8. The original implementation date had been set for July 2019, however taking into account the ongoing changes to team structures; it was decided to postpone this until all staff and partners had undertaken training and practice guidance was in place.

Development of Resource Enablement Group

9. The Resource Enablement Group (REG) was established with a fixed and rotating membership. The fixed membership has been the Barrhead Locality Manager and Client Finance Officer. Other members include team managers, social workers and social work assistants and finance support officers who rotate, allowing all staff the opportunity to take part and contribute to the work and development of the REG.
10. The first part of the process is that the social worker or social work assistant completes the questionnaire with the person and their family and undertakes an outcomes assessment. Following this they meet with the finance support officer who uses the indicative budget calculator to produce an indicative budget. The worker then uses the indicative individual budget to plan with the person and with the finance support officer to cost the plan. The costed care plan, outcomes assessment and indicative banking are presented to REG.
11. At the REG the social worker gives a brief background, outlines the outcome and the plan to meet these outcomes. Either the plan is accepted or REG discussions inform the care plan. In many cases changes can be made in the meeting. If further information or significant changes are the required, the social worker is asked to attend the following meeting with an updated plan. The decisions of the REG are all recorded.
12. Initially workers were not asked to attend the meeting and the group reviewed the papers submitted. However the REG found that they sometimes had insufficient information to approve the budget and plan. In order to address this, workers are asked to attend and present to the REG.
13. Workers and managers have reported positively on the process both from the perspective of being a member of the REG and presenting the case for a budget and plan. Three months following implementation, the demand to attend the REG is such that it has been changed from a fortnightly to a weekly meeting, alternating between the Barrhead and Eastwood Localities.

Individual Budgets

14. 36 cases for the Barrhead Locality have been presented to the REG. 7 have been new cases and 29 have been as a result of a review. Of the 29 reviews undertaken to date, 9 have seen a reduction in the indicative budget. This is likely to be due to the proportion of higher funded cases being within the Barrhead Locality which hosts the Learning Disability Team. Planning for 4 of these cases have resulted in a higher budget being agreed and a plan to work towards the indicative budget. This is likely to be in relation to the complexity or requirement of 2:1 support identified within the risk assessment.
15. 52 Eastwood Locality cases have been presented to the REG, 15 of which have been new cases and 36 have been as a result of reviews. Of the 36 reviews, 11 have seen a reduction in their care costs. The higher levels of budget reduction may be as a result of reviews following crisis intervention where an initially higher level of resource for respite or use of an off framework provider resulted in increased costs.
16. Each case brought to the REG is given a review date. Although most cases will be reviewed annually, high risk cases, or those where emergency care has been agreed (and will need to be reviewed again once no longer in crisis) are given a much shorter timeframe for review – usually between 6 weeks and 3 months. Reminders will be sent to staff about cases due to be brought back for review to allow them time to complete new paperwork if applicable.

CONSULTATION AND PARTNERSHIP WORKING

17. Partners have participated in the outcome planning and individual budget training.

IMPLICATIONS OF THE PROPOSAL

Finance

18. No changes have been made to the calculator at present. Indicative budget amounts compared with actual agreed budgets and previous budgets (where applicable) will be compiled for January – March to establish if the calculator is working within expected parameters. However given the recent budget announcement and depending on ongoing discussions with our partner organisations around final budget settlement, it may be necessary to make further changes to the scope of the calculator.
19. The decision to defer charging a contribution to the Individual Budget was originally deferred until April 2020 to ensure that there was equity in the process while people were awaiting review. As the introduction of the new process was delayed until December 2019 it is recommended that a decision on charging be deferred until April 2021.

CONCLUSIONS

20. Whilst there has been a slight delay in implementing the Individual Budget process agreed by the Integration Joint Board, the Resource Enablement Groups are well established and over 80 individual budgets and outcome plans have been considered.

RECOMMENDATIONS

21 The Integration Joint Board is asked to note and discuss the update on implementation contained in the report

22. The Integration Joint Board is asked to approve the deferment of charging a client contribution until April 2021.

REPORT AUTHOR AND PERSON TO CONTACT

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February 2020

Chief Officer, IJB : Julie Murray

BACKGROUND PAPERS

IJB PAPER 26.06.2019: Individual Budget Update
<https://www.eastrenfrewshire.gov.uk/CHttpHandler.ashx?id=24642&p=0>

IJB PAPER 28.11.2018: Individual Budget Process
<https://www.eastrenfrewshire.gov.uk/CHttpHandler.ashx?id=23458&p=0>

IJB PAPER 27.06.2018: Individual Budgets Self Directed Support Update
<http://www.eastrenfrewshire.gov.uk/CHttpHandler.ashx?id=22619&p=0>