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**REPORT TO: MORAY INTEGRATION JOINT BOARD ON 30 AUGUST 2018**

**SUBJECT: UPDATE ON THE LEARNING DISABILITY TRANSFORMATION PROJECT**

**BY: HEAD OF SERVICE, STRATEGY AND COMMISSIONING**

**1. REASON FOR REPORT**

- 1.1 To inform the Board of the progress made in implementing the Learning Disability Transformation Project Plan and the benefits that have been realised to-date.

**2. RECOMMENDATION**

- 2.1 It is recommended that the Moray Integration Joint Board (MIJB) considers and notes:
- i) the progress made to-date in implementing the Learning Disability Transformation Project Plan;
  - ii) the financial and non-financial benefits that have been realised to-date; and
  - iii) that further up-dates to the MIJB will be provided as the project continues to progress.

**3. BACKGROUND**

- 3.1 Board members will recall that on 31 August 2017 a report was submitted outlining an ambitious transformational change project in relation to Integrated Learning Disability Services in Moray. (paragraph 11 of the minute refers).
- 3.2 One of the key points made in the report was that the current way that Health & Social Care Moray delivers integrated community learning disability services is not financially sustainable in the long-term.
- 3.3 Consequently in the spring of 2017, based on emerging best practice in England & Wales Learning Disability Services undertook to implement a project plan that would result in a new model of commissioning and delivering health and social care services for people with a learning disability in Moray.
- 3.4 This new model would aim to lead to delivering better personal outcomes for people who receive support and, at the same time, achieve best value for money.

- 3.5 The underpinning rationale for this approach is the Progression Model. The Progression Model is a person-centred developmental approach that seeks to support each adult with a learning disability to achieve their aspirations for independence. It is a relational change from traditional care management approaches by focussing on the individuals' hopes and choices, using these as the basis to co-develop care and support plans that enable each person to reach their potential.
- 3.6 The Progression Model is based on the premise that efficiencies will result from focusing on the outcomes that are most important to people and ensuring that support services are aligned to these outcomes.
- 3.7 At the inception of the project, it was understood that to achieve this transformational change required changes to be made in relation to:-
- The way in which assessments are carried out;
  - Support plans are prepared;
  - Risks are managed;
  - Reviews are undertaken; and
  - Services are provided.
- 3.8 The project plan therefore took a systems wide approach that encompasses the Integrated Learning Disability Team, Commissioning and In-house (Health and Social Care Moray) Support. The inter-relationship between the different functions involved in the delivery of integrated learning disability services and the progression model is illustrated in **Appendix 1**.
- 3.9 The project plan successfully led to the following project plan activities being completed. This includes the development of new care support and treatment plans, a stronger emphasis on commissioning services & accommodation that supports independent living, outcomes based approach to contract monitoring outcomes based supervision & coaching for staff and the adoption of Open Space events as an innovative different way of meaningfully engaging with people who have a learning disability.
- 3.10 While a number of important activities such as the development of a Care Fund Calculator to assist with the more efficient commissioning of services, and an online contract monitoring tool are still being pursued, the new progression focused operating model went live on 10 October 2017.
- 3.11 Consequently, the purpose of this report is to up-date the Board on the financial and non-financial benefits secured to-date from this transformational change project.

#### **4. KEY MATTERS RELEVANT TO RECOMMENDATION**

- 4.1 In being able to measure if the above benefits have been secured from the implementation of this project, a Balanced Scorecard approach has been adopted.
- 4.2 For this Learning Disability Transformation Project, this means viewing the impact of this initiative from 4 inter-related perspectives. These perspectives are:-

- The Personal Outcomes achieved for the Customer (service user);
- The Financial Impact of the initiative;
- Internal Processes; and
- Workforce Learning

4.3 This approach is based on the premise that any initiative that strives for continuous improvement will need to achieve positive results in relation to each of the 4 perspectives.

4.4 At each of the monthly project board meetings, a balance scorecard up-date is presented. While the process of collating some of the above data is in the process of being refined and the workforce learning events are not scheduled to be undertaken until the autumn of this year, at this relatively early stage in implementing the new operating model the project can demonstrate the following benefits.

#### **4.5. The Personal Outcomes Achieved for the Customer (Service User)**

4.5.1 In relation to this perspective, since June 2017 until June 2018, 32 people with learning disabilities have had a change in their living circumstances, either moving from residential accommodation to supported living, family care to support living or returned from out of area placements and into supported living. An outcome focussed, individual budget approach has been used to ensure that the care that has been commissioned, is designed to meet the person's aspirations and potential.

4.5.2 For example, in one Moray village, Health & Social Care Moray had previously commissioned a residential unit for seven people and a supported living unit for six people, on a "block funded" basis. However, more recently only nine people in total were accommodated in these two properties. This meant that the council were providing funding for thirteen places, though it was only possible for nine people to be accommodated in the two houses. Through assessment, it was clear that whilst people really enjoyed living in this village, they would not have chosen to live with the people they were living with. This was evident from what they were telling the Integrated Learning Disability Team and also from how they expressed themselves through their behaviour.

4.5.3 The commissioned partners were also keen to change their model of care. An approach to a social housing provider lead the Integrated Learning Disability Team, with support from Commissioning colleagues, to secure nomination rights to tenancies for four new build one bedroom flats, the first social housing to be built in this village for a generation. An initial assessment identified four of the nine people who would benefit by continuing to live in the village and within their own tenancy. Their choices and aspirations were identified through conversations with the individuals, their family, guardians, support staff and advocacy.

4.5.4 Furthermore both buildings were not fit for purpose and did not provide a high quality living environment in terms of accessibility and fire safety risks.

#### **4.6 The Financial Impact**

- 4.6.1 For the purposes of determining the financial impact of this project, based on a snapshot in time (as service users requirements are constantly changing). People with a learning disability who receive a service can be further segmented into 4 groups. These groups are indicated in the table below:-

	<b>Customer Group</b>	<b>Number of Service Users</b>	<b>Projected Annual Surplus/(Deficit) (2018/19)</b>
1.	Residential Care/ supported accommodation to living in different accommodation with support	20	<b>£488,366</b>
2.	Lived with Family to living in own tenancy with support	9	(£163,393)
3.	Lived in a non-family setting (usually out of area) to living in own tenancy with support	3	(£491,930)
4.	People who become 18 and live at home and are new to adult services	13	(£132,059)
	<b>Total</b>	<b>45</b>	<b>(£299,016)</b>

- 4.6.2 Line one indicates that the work underway to move from the extensive use of “block funded” contracts for care and support to one of individual budgets for people to live in their own tenancies is delivering a significant financial impact. An individual budget approach is entirely supported by the Social Care (Self-directed Support) (Scotland) Act 2013. As detailed in para 4.5.2 above, in order to calculate the projected annual surplus/deficit using an individual service model an element of void costs have been included due to the reduced number of individuals occupying the block funded contracts.
- 4.6.3 Line two focusses on the group of people who have previously lived with their families, and have been very well supported by them and accessing day activities with support. Due to changes in circumstances, often because of carer health, the person needs to move from their family home, and the level of support they then require is significantly more than the previously required. In terms of budget, this is essentially unfunded growth for new service requirements. Taking a progression approach, it is anticipated that these costs will decrease in the longer term.
- 4.6.4 Line three focusses on people who are returning to Moray from out of area placements. These are often placements that are made as education placement requests that are then extended into young adulthood. Because they are usually residential facilities, people will often require significant additional support initially.
- 4.6.5 Line four focuses on young people who come into the adult learning disabilities service age 18. Moray Council have made budget provision of £200k per annum to allow for young people who transition into adult services at the age of 18, this is drawn into the budget on a case by case basis. Although there are 13 service users known in this area, only costs for 7 of the service users are currently known and included in the above. The transition costs will increase through the year.

## **4.7 Internal Processes**

- 4.7.1 For this reporting period, 85 of the new care support and treatment plans have been completed by the Integrated Learning Disability Team, of which 46 have been identified as having significant potential to benefit from a progression focused approach. A further 3 specialist assessments have also been completed by Day Services.

## **4.8 Workforce Learning**

- 4.8.1 While staff supervision is ongoing and staff insights across the Integrated Learning Disability, Commissioning and Day Service Teams is regularly secured through training workshops and team meetings, a workforce review meeting is also scheduled to be held in the Autumn of 2018. Through group discussion, staff will be invited to identify strengths and areas for improvement in relation to the implementation of the new progression focused operating model. This approach is consistent with good project management practice.
- 4.8.2 In addition to the above, a staff survey was circulated to members of the Integrated Learning Disability Team. The survey focused on the efficiency of the team meetings and provides a useful benchmark for continuous improvement. In particular, since the first survey was circulated in November 2017, staff have reported that meetings have become an integral way of efficiently processing referrals and discussing risk in a multi-disciplinary setting.

## **5. SUMMARY OF IMPLICATIONS**

### **(a) Corporate Plan and 10 Year Plan (Local Outcomes Improvement Plan (LOIP)) and Moray Integration Joint Board Strategic Commissioning Plan 2016 – 2019**

The Learning Disability Transformation Project is consistent with the vision statement and with the 5 strategic priorities identified in the Strategic Commissioning Plan 2016-2019.

### **(b) Policy and Legal**

There are no legal implications arising from this report.

The development and implementation of the new progression operating model will mean that policy and procedures will be revised accordingly.

### **(c) Financial implications**

This report identifies financial benefits emerging from the transformational change programme, particularly for moving from older “block funded” contracts to individual budgets. However it also highlights where there are additional financial pressures. Typically people who have been very well supported by their families in their family home require significantly more support when they move into their own homes (creating a budget pressure). An additional financial pressure is also incurred when people return to Moray as young adults to their own tenancies with support. The figures in para 4.6 above are based on a snapshot of service user requirements, in order to produce an indicative financial surplus/deficit for the purpose of this report.

### **(d) Risk Implications and Mitigation**

As part of the project management approach, a risk & issues log is reviewed at each meeting of the Learning Disability Transformation Project Board. The ability to demonstrate the non-financial and financial benefits derived from this project has been identified as a risk from the inception of this initiative.

**(e) Staffing Implications**

The focus of the Learning Disability Transformation Project is on cultural change. There are therefore no staffing implications directly arising from this report.

**(f) Property**

There are no property issues arising from this report.

**(g) Equalities/Socio Economic Impact**

An Equality Impact Assessment is not required for this report.

**(h) Consultations**

This report has been circulated to Joyce Lorimer (Service Manager and Project Sponsor), Roddy Huggan (Commissioning Manager and Commissioning Workstream Manager, John Campbell (Provider Manager and In-house Support Workstream Manager), Jane Mackie (Joint Operational Manager & Programme Sponsor) and Bruce Woodward (Senior Performance Officer), Tracey Abdy (Chief Financial Officer) and Deborah O'Shea (Principal Accountant), who are in agreement with the content where it relates to their area of responsibility.

**6. CONCLUSION**

**6.1.1 The Board will note that the Learning Disability Transformation Project has been a significant project for Health & Social Care Moray since the project plan was initiated in the spring of 2017.**

**6.1.2 Since the new progression based operating model was launched in October 2017, the Learning Disability Transformation Project Board has identified an improvement in the personal outcomes for many people with a learning disability supported by this new way of operating.**

**6.1.3 The Balanced Scorecard Approach outlined in this report also focuses on internal processes and workforce learning. These elements further demonstrate the strength of the progression model and its implementation in Moray.**

**6.1.4 The IJB is therefore asked to note the achievements to date of this transformation project. There is an opportunity to further develop and refine the progression based operating model in Moray.**

**6.1.5 It is proposed that further project up-dates will be provided to this Board on the benefits that have been realised.**

Authors of Report: Joyce Lorimer, Integrated Services Service Manager & Robin Paterson, Senior Project Officer

Background Papers: Available from the authors of this report

Ref: