

Transforming Peoples Lives - Developing Personalised Services in Central Bedfordshire – Third Sector Providers Workshop – 2 July 2010

Implications for the Sector

Speech by John Gelder, Director of Voluntary and Community Action.

<Intro Slide>

I've the been given the *I want to fall asleep after my lunch* slot

I am of course quite happy for you to do so if you are aged under five or over 70.

For the rest of you this will be an interactive session where you will need to make a quick assessment of certain information and then indicate accordingly in the manner specified.

I did come up with an alternative title for this presentation

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There are known knowns. These are things we know that we know.

There are known unknowns. That is to say, there are things that we know we don't know.

But there are also unknown unknowns. There are things we don't know we don't know.

- **Donald Rumsfeld**

..... but it was a bit too long.

Now, just to see who's still awake,

stand up if you have heard or seen this quote before?

And stay standing up if you think you understand it.

Those still standing can now sit down. Thank you.

The impact of personalisation on voluntary and community sector providers in the health and social care sector is going to be enormous.

It is going to *get personal* and it'll be an emotional roller coaster ride as you work through the impact personalisation will have on you, your staff and volunteers, and your organisation.

You may well see it as a threat; perhaps you see it as an opportunity; perhaps you don't know but I can guarantee there will be many unknown unknowns.

My job in the next 20 minutes is to make these at least known unknowns.

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We will look at the extent to which you have addressed six important issues, namely

- Strategy and Governance
- Creating a person-centred culture in your organisation
- Workforce
- Marketing
- Finance
- Policies and Procedures

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1. Strategy and Governance

Here are four statements that I would like you to consider before picking the one that best describes where you think your organisation is at present.

| | | |
|---|---|--|
| 1 | We have not considered the impact of personalisation and don't know if this will impact on our organisation | |
| 2 | We think personalisation will have an impact on our organisation but are not sure what this will be or how to respond | |
| 3 | We have identified some areas that will affect us, have begun to have discussions with commissioners and stakeholders and have started to develop a plan that sets out the changes we need to make. | |
| 4 | We have a clear strategy and plan for delivering personalised support and remodelling our business that the whole organisation is committed to. | |

In deciding which of the statements to choose I would like you to consider the following:

Have you had discussions with your staff, volunteers and trustees about the possible impact of personalisation and the impact this will have on your organisation?
Are you going to embrace personalised budgets and services or say this is not for us and, in any case, it wont work and the government will probably change it?

And the bad news for those of you who might think this, is that all the political parties have embraced this approach and the new coalition government is likely to push ahead with this at a much faster pace than the previous government.

What are the implications if you **do not** embrace personalisation?

Are all your senior managers and trustees convinced of the need to develop a strategic response?

Have you started to engage with commissioners, service users or customers and other stakeholders to identify what personalisation means for your services?

Do you have a plan that sets out the impact on all staff, including finance and back office functions, that staff and trustees are signed up to?

Do you have a clear vision and strategy based on the aspirations of the people you support,

that is understood and acted upon,
and which takes account of the resource implications?

Have you reviewed your governing document
For example, to ensure it allows you to deliver services direct to individuals rather than groups?

Now, looking at the four statements on the screen,
please put your **right hand** up if you believe
... statement 1 applies to your organisation ?
... or statement 2 ?
... or statement 3 ?
... or statement 4 ?

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2. Creating a person-centred culture in your organisation

Here are five statements that I would like you to consider before picking the one that best describes where you think your organisation is at present.

| | | |
|---|--|--|
| 1 | We don't think we need to change the culture of our organisation. | |
| 2 | We think personalisation will have an impact on the culture of our organisation and the way we operate (our finances) but believe these will be limited. | |
| 3 | We have begun to think about personalisation and what a person-centred approach will mean for our organisation and how we operate. | |
| 4 | We understand personalisation will have a significant impact on our culture, systems and processes and have begun discussions with staff and volunteers across the organisation to help them understand what this means. | |
| 5 | We have worked with staff, volunteers and service users to identify the culture change that needs to take place throughout the organisation. | |

In deciding which of the statements to choose I would like you to consider the following:

Have you had discussions with your staff, volunteers and trustees about what a person-centred approach will mean for your organisation?

How will a person-centred approach affect the services you deliver and your systems?

Have you had discussions with managers, support workers and volunteers to identify how their work will change?

What about those who provide back-office support?

If you provide support to groups of people,
perhaps according to a specification from the local authority or the PCT,
to what extent have you translated that specification into a more person-centred document.

Do you have clearly identified outcomes that can be used in person-centred reviews?

Do you use person-centred support plans?

Are your staff trained to use person-centred thinking, tools and approaches?

Do you use community development approaches
and links with other community activities

to enable those you support to become active citizens?

Are these activities included in individual support plans?

How do you manage risk in your organisation, in relation to the people you support?

Will you need to adopt a new approach to risk, one that takes account of individuals' circumstances and aspirations, ensures people have a chance to do the things they want to and where you support them to do this?

Have you identified ways in which to implement the cultural change that is needed?

Are you supporting staff and volunteers to do the same, through training, coaching and problem solving?

Have you looked at the way you are communicating within the organisation and are you giving out the same key messages?

Now, looking at the five statements on the screen, please put your **left hand** up if you believe ... statement 1 applies to your organisation ?
... or statement 2 ?
... or statement 3 ?
... or statement 4 ?
... or statement 5 ?

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3. Workforce

Here are four statements that I would like you to consider before picking the one that best describes where you think your organisation is at present.

| | | |
|---|---|--|
| 1 | Staff are recruited against a formal job description and person specification; support and supervision is by way of manager's feedback. | |
| 2 | We think we need to find ways of involving others in the recruitment of staff and to take account of people's views in supervision but are not sure how to do this. | |
| 3 | We have trained some people who we support to be involved in recruiting staff to the organisation and in providing feedback to staff on their use & implementation of individual support plans, when supervising staff. | |
| 4 | Our customers recruit their own staff and we work closely with them and their families in all aspects of the selection and recruitment process. We ask them how the support worker is doing and this forms part of our performance management system. | |

In deciding which of the statements to choose I would like you to consider the following:

Have you used, or explored ways of using, service users in developing job descriptions and in selecting staff?

Have they received training to do this?

Are staff recruited to the individual you are supporting, rather than a pool of staff?

Are job adverts and person specs based on the person you are supporting, with interview questions based on the individual's support plan?

Are your customers involved in the recruitment and selection of staff as much or as little as they want to be, with some people/families leading on all aspects of the process with appropriate support?

Are support workers clear about their core responsibilities and where they can use creativity and judgement?

What will be your reaction when volunteers and trustees, and perhaps staff, say that they joined your organisation because you delivered valuable services to vulnerable people in need free of charge and that they don't like having to charge service users?

Now, looking at the four statements on the screen, please put your **right hand** up if you believe
... statement 1 applies to your organisation ?
... or statement 2 ?
... or statement 3 ?
... or statement 4 ?

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4. Marketing

Here are five statements that I would like you to consider before picking the one that best describes where you think your organisation is at present.

| | | |
|---|---|--|
| 1 | We see our customers as the local authority and the PCT and focus on selling our services to them. | |
| 2 | We say the people who use our services are our customers and we know we need to communicate with those who may want to buy our services or who want information on our services but are not sure where to make changes. | |
| 3 | We have started to rethink how we might market ourselves to people better, taking account of the 'customer journey', and what we need to change about the information we put out. | |
| 4 | We have developed accessible information that reflects the customer journey and the experience we want people to have with us. We are working on how to tell them what we can offer through individually costed services and different methods of marketing our services, including Shop4Support. | |
| 5 | We recognise that we have a variety of customers and partners and work with each of them in an individual, person-centred way. We use a range of accessible approaches to market our products and services, and have a clear marketing strategy in place. | |

In deciding which of the statements to choose I would like you to consider the following:

Are your services capable of being delivered to individuals, or are they still structured for groups?

Are you clear about the products and services you offer?

Do they focus on lifestyle solutions to meet the individual's personalised plan outcomes and choices?

If you support people with learning disabilities to gain employment skills around horticulture then I'm sure you can offer individuals practical training in horticulture, job search skills, volunteer placements

and access to paid work.....

But what if your customer wants to do judo lessons and learn hairdressing?

Should you be offering those services?

If you do, will that dilute what you already do?

Do you know what else is on offer to your potential customers and how your offer will compete?

How will you compete with others to retain your customers?

Do you need to work in partnership with others to offer 'the full package'?

Will you be the specialist store in the high street?

Or are you the superstore with competitive retail and marketing to attract customers?

Do your staff have the marketing skills to promote your products and services through the high street, including on-line?

Now, looking at the five statements on the screen, please stand up if you believe

- ... statement 1 applies to your organisation ?
- ... or statement 2 ?
- ... or statement 3 ?
- ... or statement 4 ?
- ... or statement 5 ?

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5. Finance

Here are five statements that I would like you to consider before picking the one that best describes where you think your organisation is at present.

| | | |
|---|---|--|
| 1 | We have contracts with the local authority or PCT, which generally focus on hours delivered and/or tasks; our invoicing and accounting meets the needs of the funder and we track funding by cost centre. | |
| 2 | We realise we need to understand what it costs to provide support to individuals, that we may need to develop new contract models and adapt our invoicing and accounting systems to suit individuals but are not sure what to do | |
| 3 | We know what it costs to deliver individual support packages and are developing financial systems for individual invoicing and accounting. | |
| 4 | We have some people with personal budgets and contracts; we can invoice them against a cost centre for each individual and are working on how we make our financial information more accessible for customers. | |
| 5 | We provide detailed costs and have individual contracts for all our customers; we are clear that they can use their money flexibly, based on their support plan, and we provide financial information linked to their plan. People can pay using different payment methods. | |

In deciding which of the statements to choose I would like you to consider the following:

Do you know what it costs to provide support to individuals, including overheads, back-office functions, management charges and marketing?

Can you explain how you have calculated your hourly rate and developed costs for the people you support?

Can you provide detailed costings to someone who may be interested in buying a service from you, based on their support plan?

Have you developed contract documentation that is easy to understand and read?

Have you talked to commissioning managers about creating personalised budgets or individualised service funds for your existing customers?

Can your financial systems cope with individual customers' invoicing?

Do you have cost centres for each individual with a personal budget and self-funders?

Are these systems flexible enough to cope with the different ways in which people want to spend their personal budget?

Do you offer people different ways to pay: invoicing, cash, direct debits, card payments, on-line?

Can you provide individuals with easy to understand information on how they are spending their personalised budget, how this relates to their support plan and whether they are under or over budget?

Now, looking at the five statements on the screen, please put both hands up if you believe

... statement 1 applies to your organisation ?

... or statement 2 ?

... or statement 3 ?

... or statement 4 ?

... or statement 5 ?

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6. Policies and Procedures

Here are four statements that I would like you to consider before picking the one that best describes where you think your organisation is at present.

| | | |
|---|--|--|
| 1 | We have polices on how we work at present but they do not take account of personalisation. | |
| 2 | We recognise that our policies will need to change to reflect a person-centred approach but have not yet started to make changes. | |
| 3 | We have begun to work with staff and service users to ensure our policies actively promote a person-centred approach. | |
| 4 | We have changed our policies and procedures to ensure they are person-centred, enabling people to have choice and control over their lives; they are presented in a way that is easy to read and understand. | |

In deciding which of the statements to choose I would like you to consider the following:

Have you reviewed your policies? Do you need to streamline them?

Have you involved staff, volunteers and service users in identifying where your policies need to change?

Does your safeguarding policy reflect the delivery of personalised services?

Have you amended your Financial Controls Policy to reflect the need for different payment methods?

Are those policies that apply to customers in a form that can be easily understood?

Now, looking at the four statements on the screen,

please put your left hand up if you believe

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... or statement 2 ?

... or statement 3 ?

... or statement 4 ?

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In Conclusion

Thank you for engaging with that exercise so fully.

If you were unsure or didn't know ... well, please decide pretty quickly!

Clearly, for many of you, there is still much to do in preparing for personalisation.

I hope many of you will be starting your own *Getting Personal to do list*.

But we don't have to do it all immediately.

There will be a programme of help and support available, which we will look at in the final session.

I would like to draw your attention to an excellent document *Progress for Providers: Checking your progress in delivering personalised services* version 2:

<http://www.helensandersonassociates.co.uk/media/31758/progressforproviders2.pdf>

You may also want to take a look at the *Shop4Support* website:

www.shop4support.com/s4s/ui/content/Community/List.aspx

You can also get help and advice from Ian at CVS and Sara at Voluntary and Community Action.

as well as further information from our respective websites.

Details of all these sources are given on this final slide.