

# Health and Adult Social Care Overview & Scrutiny Committee Report

Report subject	ASC Fulfilled Lives Programme – Programme update and Self-Directed Support
Meeting date	03 March 2025
Status	Public
Executive summary	<p>The Fulfilled Lives Transformation Programme in Adult Social Care comprises of four interdependent projects:</p> <ol style="list-style-type: none"> <li>1. How We Work</li> <li>2. Self-Directed Support</li> <li>3. Short-Term Support</li> <li>4. Support at Home</li> </ol> <p>The How We Work and Self-Directed Support projects are the most advanced, with Short-Term Support and Support at Home having now commenced the ‘delivery stage’ of the programme.</p> <p>A Fulfilled Lives Programme progress report was presented at Cabinet on 15 January 2025.</p> <p>This paper provides a further update about:</p> <ol style="list-style-type: none"> <li>1. the Self-Directed Support project, and</li> <li>2. Benefits tracking, including links to the Future Care (Urgent and Emergency Care) Programme.</li> </ol>
Recommendations	The Committee is invited to review the contents of the report and provide any recommendations.
Reason for recommendations	When approving the establishment of the Fulfilled Lives programme and business case in July 2024, Cabinet invited the Health and Adult Social Care Overview and Scrutiny Committee to provide regular scrutiny of progress towards benefits and sustainable change.
Portfolio Holder(s):	Cllr David Brown, Portfolio Holder for Health and Wellbeing
Corporate Director:	Jillian Kay, Corporate Director for Wellbeing
Report Authors:	<p>Tim Branson (Head of Service/Programme Lead)</p> <p>Kate Garner (Commissioning Manager for Personnalisation)</p> <p>Harry Ovnik (Programme Manager)</p>

Wards:	Council-wide
Classification:	Update

## Background

1. In January 2024 BCP Adult Social Care embarked on a detailed 3-month period of analysis and diagnostic assessment of the current position of service delivery within the department. The aim was to identify opportunities for transformation and changes that could enhance our service model to improve residents' experiences of accessing adult social care, better manage current and future demand, and explore potential for financial savings.
2. During this period, in addition to our own detailed assessment, we considered other areas of previous activity undertaken in 23/24:
  - The development of a detailed self-assessment as part of the Council's preparation for CQC inspection arrangements.
  - An LGA peer challenge to test the Council's self-assessment and offer recommendations on areas to focus attention.
  - An LGA financial review to support a greater understanding of the financial challenges and opportunities.
  - A bespoke safeguarding review undertaken by Partners in Care and Health.
  - Reviews of evidence from other local authorities and sector led reports on priorities for transformation including [ADASS - Time to Act](#).
3. This detailed evidenced-based assessment period between January 24 and April 24, informed a strategic case for change within ASC, culminating in a transformation business case and delivery plan being set out to Cabinet and Council in July 2024.
4. This business case outlined the opportunities available to deliver true transformation and innovation within ASC, whilst embedding sustainable change which will support future demand, and achieve financial and service quality benefits through a transformation programme called 'Fulfilled Lives'.

- The 4-year programme of work has four interlinked projects as shown in figure 1:

## A reminder - Four projects that form the programme



1	How we work	To implement the 3 conversations approach, building on innovation sites, embedding strengths-based ways of supporting residents, focusing on prevention. How we work will also focus on making improvements within our First Response function.
2	Short-term support	Improve community access to reablement services, ensuring that all appropriate individuals are able to maximise their goals and have the best possible chance at independence – reducing the need for long term services .
3	Self-Directed Support	We will ensure more people are in control of their own support by developing more community-based options for people via Direct Payments or Individual Service Funds. Reducing the need for more traditional services at a higher cost.
4	Support at Home	Develop and implement a new Support at Home provision, enabling people to stay as independent as possible in their own home and reducing the need for residential placements .



**Figure 1 – representing the 4 projects that make up the Fulfilled Lives programmes and a high-level description.**

- The transformation business case and accompanying delivery plan set out the anticipated achievements against the four projects, with a total investment of £2.9m required to enable the delivery of the full programme, and total anticipated savings of £3.5m recurring.
- In July 24, Cabinet and Council agreed to support the transformation programme and approve the release of £1.79m for the first year of the programme. Cabinet asked for a progress report, which was presented in January 2025, focused on the ‘design and scope’ stage of the programme, with a further more detailed report to be presented to Cabinet in July 2025 covering progress and recommendations for the subsequent remaining years of the programme.
- Cabinet also invited the Health and Adult Social Care Overview and Scrutiny Committee to provide regular scrutiny of progress towards the realisation of benefits and sustainable change. The Committee has agreed an approach to scrutiny as part of their work plan over the next 18 months. A briefing session was held on 4 November which focussed on the How We Work project and the risks and opportunities of data.
- This report focuses on the Self-Directed Support project and an update on benefits realisation tracking.

### Self-Directed Support Project Update

- Enabling people to self-direct their support and putting in place the resources they will need to do this, aligns with the strategies agreed by the council, and is the approach adopted by councils across the country. Strengths-based practice, choice in how clients direct their personal budgets, and a diverse provider marketplace all bring benefits and are the national direction of travel for social care.
- The workstreams within the Self-Directed Support project provide solutions that contribute to the success of the How We Work project and the 3 conversations approach. The activity within the workstreams create more choice and control for

people, by developing personal budget options and developing a diverse range of community-based support.

12. Self-Directed Support and How We Work projects resonate strongly with the Gloriously Ordinary Lives<sup>1</sup> movement, which wants to see people who need additional support living good lives whether they are doing something mundane or a special activity.

13. Summary of Self-Directed Support workstreams shown in figure 2:

Workstream	Delivery partner	Current Position	Impact in the next 6 – 12 months
Individual Service Funds (ISFs)	Self-Directed Futures	<ul style="list-style-type: none"> <li>Provider pilot under – 5 providers involved</li> <li>Draft ISF specification has been co-produced</li> <li>ISF Task &amp; Finish group is informing the pilot development</li> </ul>	<ul style="list-style-type: none"> <li>Our first ISF providers will have joined our ISF framework.</li> <li>Clients will be able to choose an ISF and an ISF provider as a way to use their personal budget.</li> <li>ISF holders will have more control in how they use their budget and more choice in what they use it for.</li> <li>ISF providers will use the opportunity of the ISF and working closely with their client to optimise their support.</li> </ul>
Trusted Reviewers Programme	Community Action Network	<ul style="list-style-type: none"> <li>100 conversations with people at day centres and their families</li> <li>50 taster sessions for people at day centres to try out</li> <li>10 people moving to alternative daytime activities</li> </ul>	<ul style="list-style-type: none"> <li>More people will have taken part in taster sessions and pilot activities and decided if they would like an alternative activity in the long term.</li> <li>Our social care practitioners will be supported by the Trusted Reviewers to find the right activities for the new clients they are working with.</li> <li>There will be more easy-to-access information about daytime activities available for clients and their families.</li> </ul>
Community micro-enterprises (CMEs) development programme – focussing on daytime support	Community Catalysts	<ul style="list-style-type: none"> <li>CME development programme live and being promoted across BCP</li> <li>Community Catalyst change group established</li> <li>3 potential CME's currently going through the development programme.</li> </ul>	<ul style="list-style-type: none"> <li>CMEs will have completed the development programme and be offering their services to their local community.</li> <li>There will be more choice in support options for Direct Payment holders.</li> <li>There will be more choice in support for people who are self-funders.</li> </ul>

**Figure 2 – representing the 3 key workstreams across the self-directed project, the delivery partner, the current workstream position as at Feb 2025 and impact over the next 6-12 months.**

14. Current examples of new alternative daytime activities include The Filo Project which supports older people – perhaps with early-stage dementia – in small groups within a Filo host's home, and an organisation that supports young adults who have an interest in the creative arts to develop their independence and a healthy lifestyle and to connect with their local communities.

15. A community micro-enterprise (or CME) is a very small enterprise or venture (with no more than 8 staff and volunteers) offering flexible and person-centred services or support. Local people help other local people and anybody can start one. CMEs can offer a range of different services and supports to people in their area including providing daytime activities, accompanying someone to an activity or providing the transport for someone.

16. The ongoing review and development of Direct Payments (DPs) is strongly aligned to the Self-Directed Support project, particularly the Community Micro-Enterprise (CME) development. DPs are the primary personal budget route for council-supported clients to pay for CME- provided services.

<sup>1</sup> Gloriously Ordinary Lives available at: <https://www.gloriouslyordinarylives.co.uk>

17. Individual Service Funds (ISFs) will add to the options available to clients to self-direct their personal budgets and will complement the DP offer. If a client chooses an ISF as the way to self-direct their personal budget, they will work closely with their ISF provider. The providers hold the client's personal budget in a treasury management system and co-produce their support plan with them. This makes it easier than a DP for people to manage, enables them to have choice and control over how their budget is spent, and provides flexibility in what it is used for.
18. All the workstreams are designed to support people to increase and widen their connections to their communities, and this principle is integral to someone having choice and control over their support. ISF providers are required to build a network of community-based groups around the people they are supporting, the Trusted Reviewers connect people who might go to one day centre into community activities, and our CMEs will work in a hyper-local way with a deep understanding of the place they are in.
19. There is oversight of and involvement in the development of the community micro-enterprise development programme through the Community Catalyst Change Group. The Group has a diverse membership of colleagues across the council, family carers and other stakeholders. It will meet regularly to receive updates on progress with the programme and advise on any areas that may need reviewing to create the greatest benefit.
20. It is important that clients and families are supported to make informed decisions and choices when finding and working with new CMEs. Our approach will build on the support we offer to Direct Payment holders who are using their personal budget either to pay for services or to employ someone to support them. We will develop a set of resources linked to the CME programme that contain advice, guidance and links to other sources of support.
21. The CMEs that graduate from the development programme will have provided evidence that they have achieved the Community Catalyst quality standards. They will be supported to connect with each other and create peer networks, which have proven effective elsewhere in supporting the CMEs to maintain their quality and develop their services. ASC Commissioning is exploring options for its own proactive and positive approach to quality checking CMEs, e.g. through people from within the voluntary and community sector who have experience of drawing on support. Options will be coproduced to develop the approach that will best suit us.

### **Fulfilled Lives Benefits Tracking**

22. The programme has made good progress in relation to measuring and determining benefits and savings tracking throughout the programme.
23. The original programme business case and delivery plan set out the high-level key performance indicators that the programme will look to deliver against (Appendix A). These high-level programme indicators are now in place and will form a wider range of benefit and savings measures that are under development and will be in place from April 2025. An example of the wider performance measures under development can be found in Appendix B.
24. These measures will be developed into dashboards with an ability to regularly review ongoing performance and achievement against savings that have been set out.
25. Additional qualitative data will be collected by directly capturing feedback from people and families who contact the Adult Social Care Contact Centre or receive

support from other ASC Teams following adoption of the Three Conversations approach.

26. Whilst it is widely acknowledged that measuring the financial benefits of practices that are designed to prevent or delay the need for long-term care services is notoriously difficult, we have also now designed an appropriate methodology to evidence these within the programme. This has been developed with advice from Partners4Change, who supported our initial Three Conversations innovation sites, based on their experience of working with other Local Authorities.
27. The methodology involves analysing existing client profiles based on three factors: age, gender, and Primary Support Reason (PSR). A Profile Matrix will then be created that allows comparison between the average weekly cost of existing client profiles with outcomes for new people who match the same profile but will have been subject to our new ways of working. The necessary work to develop this reporting functionality is currently in-progress with our colleagues in IT, with the expectation that we will have a fully functioning reporting mechanism in place ahead of 1 April. Appendix C and D represents the draft framework methodology that will be used alongside the profile matrix.
28. A savings and benefits subgroup has now been established within the programme. This group is responsible for ensuring that appropriate methodology is in place to capture benefits and savings, that reporting is available, and benefits and savings are validated and confirmed. It will feed into the Fulfilled Lives programme board with performance and savings updates, allowing the board to fully understand the progress of the programme.
29. Work has been undertaken over recent weeks to determine links with the system wide 'Future Care Programme'. Several workshops have now taken place whereby a deep dive of both programmes has been completed, with a focus not only on the task deliverables, but the savings and benefits that have been set out. This is still a developing piece, and both the Fulfilled Lives programme and Future Care programme are committed to ensuring clarity on delivery, dependencies and a joined-up approach, where each programme will complement each other given the close links.
30. Through the initial engagement sessions with the Future Care programme, it has been evidenced that whilst both programmes are seeking to achieve savings via transformative approaches, the Future Care programme is focused on achieving these via directly improving outcomes for residents who interact with urgent and emergency care services, whilst the Fulfilled Lives programme is exploring new ways of working that can better support residents in the community. It is anticipated that each programme can provide support to one another. Ongoing engagement across both programmes will continue through the period of delivery and closure, with further targeted engagement sessions planned.

### **Summary of financial implications**

31. As outlined in the July 2024 Transformation Business case, the programme has been provided with the first-year funding of £1.79m.
32. As set out in this report, this funding has allowed key fixed term recruitment to be achieved to mobilise the programme. The total investment over a 3-year period is £2.9m to achieve recurring savings of approx. £3.5m. These savings are currently on track for being met.
33. The savings attributed to the Fulfilled Lives programme are in addition to those that have been identified via the Urgent and Emergency Care (UEC) programme,

and whilst both programmes of work have dependencies and will naturally complement each other, they will seek to achieve separate savings.

### **Summary of legal implications**

34. The Council is required by law to provide and hold direct accountability for the effectiveness, availability and value for money of Adult Social Care services. The functions are set out in legislation including the Care Act 2014 ([legislation.gov.uk](http://legislation.gov.uk))
35. In particular, the Care Act 2014 and associated statutory guidance imposes a general duty to promote the wellbeing of individuals when carrying out their care and support functions, and to safeguard adults with care and support needs from experiencing or being at risk of abuse or neglect. At the same time, the Act requires that care and support is tailored to a person's individual needs and preferences, and Local authorities are encouraged to support individuals in making their own choices and taking risks that are part of everyday life. This approach aims to empower individuals and enhance their independence and quality of life
36. The Care Act 2014 sets out key responsibilities for local authorities regarding market shaping to create a responsive and stable care market that can adapt to the needs of the local population. This includes ensuring a diverse, sustainable, and high-quality market for adult care and support services. The Act also stresses the importance of giving individuals and their carers choice and control over how their needs are met. This includes stimulating a range of care and support services to meet diverse needs.
37. Statutory roles are required to be held by the Council, and this includes a Director of Adult Social Services (DASS) and a Principal Social Worker (PSW).
38. The quality of ASC services is inspected by the Care Quality Commission (CQC) against a quality assurance framework.
39. The recommendations of the previous business case will improve the Council's ability to discharge all these duties more effectively.

### **Summary of human resources implications**

40. Human Resources processes will be followed, as required, during recruitment of resources for delivery.

### **Summary of sustainability impact**

41. There are no sustainability implications within this report.

### **Summary of public health implications**

42. Relationships with Public Health partners will be improved with transformed ways of operating ASC services, particularly around prevention and population health.

### **Summary of equality implications**

43. Full EIA documentation will be completed and reviewed at Panel (as required) during implementation of transformation plans e.g., policy change or development, service change or development.
44. The ASC strategic approach to Equality, Diversity and Inclusion aims to support transformation work with improved data and workforce support.

### **Summary of risk assessment**

45. It has already been acknowledged in the previous business case that by doing nothing, the Council is holding significant risk in relation to its ability to deliver statutory responsibilities within the available budget to adults and their families

who require support. These risks are mitigated by these ASC Transformation plans and Business Case.

46. Robust risk management processes are embedded into the programme's approach, with risks and mitigation strategies reviewed on a regular basis via the Fulfilled Lives governance structures.

### **Background Papers**

[Fulfilled Lives Progress Update Report – January 2025 Cabinet](#)