

# QUARTERLY MONITORING REPORT

**DIRECTORATE:** Health & Community  
**SERVICE:** Older People's Services  
**PERIOD:** Quarter 3 to period end 31<sup>st</sup> December 2009

## 1.0 INTRODUCTION

This quarterly monitoring report covers the Older People's Services Department third quarter period up to 31st December 2009. It describes key developments and progress against key objectives and performance indicators for the service.

The way in which RAG symbols have been used to reflect progress to date is explained in Appendix 7.

## 2.0 KEY DEVELOPMENTS

Community Extra Care service, evaluation completed and to be presented to SMT this month. Plans to establish the service within base budget now developmental stage completed.

Virtual Ward model still progressing, social work input agreed. Therapy increases planned within same timescale.

Second phase of SCIP evaluation will continue until February 2011, agreement on long term service will follow full evaluation of the effectiveness of the integrated service.

Agreed redesign of information services to develop a partnership service with Age Concern Mid Mersey and Sure Start to Later Life, offering a consistent assessment and more effective and efficient service delivery across the borough.

Completion of the local dementia strategy and associated business case to outline the commissioning priorities and performance measures that will support the full implementation of the plans.

Additional funding of £200k has been secured for the Registered Social Landlord Partnership Agreement.

Following the recruitment of a handyperson the service will commence once employment checks and induction are complete.

The second consultation event for the Affordable Warmth Strategy is scheduled for the 12th January and a draft action plan has been developed.

The Adult Placement Service has recruited two additional staff (1.5 full-time equivalents) who have taken up posts in January. Plans to further expand the service are to be developed.

Following a period of consultation and to the success of the development of satellite units to provide day activities in the community the decommissioning of Bridgwater day centre from January 2010 has been agreed.


### 3.0 EMERGING ISSUES

Review of the Palliative Care and End of Life services has been completed by the PCT. The outcome of the review is to develop a gold standard for End of Life services across PCT and Social Care across the whole PCT footprint. The Halton social care model is seen as a model of good practice and is expected to be replicated within St Helens Borough Council.

A business case for the Halton Home Improvement and Independent Living Services is being developed, first draft completed.

The opportunity to expand the footprint of the Halton Integrated Community Equipment Service to provide a service in the St Helens area is being explored, to improve efficiencies within the service.

### 4.0 PROGRESS AGAINST MILESTONES/OBJECTIVES

<b>Total</b>	<b>15</b>		<b>14</b>		<b>1</b>		<b>0</b>
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All key objectives/milestones are on target, with one exception. In this case decisions are awaited relating to Extra Care Housing funding and negotiations with providers.  
Appendix 1 refers

### 5.0 SERVICE REVIEW

The second phase of the environmental improvement work within Oakmeadow, including the integrated care monitoring/call system, will be completed on target by the end of December.




The 6 month review/evaluation of the re-ablement service has been completed and reported to SMT, recommendations agreed and a further report to SMT in April 2010. The report will be presented to the IC Executive Board by the end of the financial year.

The restaurant at Dorset Gardens is now fully operational under new management as agreed within the review.

As part of the review of the OPCMHT additional SW support was recommended. This was agreed and an additional social worker has been appointed and will commence in the new year.




Age Concern Mid Mersey information provision and British Red Cross Home From Hospital services have been reviewed and proposals for redesign and efficiencies have been submitted and agreed through Senior Management Team.

## 6.0 PROGRESS AGAINST KEY PERFORMANCE INDICATORS

<b>Total</b>	<b>8</b>		<b>6</b>		<b>2</b>		<b>0</b>
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Most key indicators are on target, however delivery of equipment is not meeting target at Q3 and numbers of carers receiving assessment is also below target. Appendix 2 refers

## 6.1 PROGRESS AGAINST OTHER PERFORMANCE INDICATORS

<b>Total</b>	<b>1</b>		<b>0</b>		<b>1</b>		<b>0</b>
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Non key indicators are reported by exception at Q3, one indicator has attracted an amber RAG symbol. Refer to Appendix 3

## 7.0 RISK CONTROL MEASURES

During the production of the 2009-12 Service Plan, the service was required to undertake a risk assessment of all Key Service Objectives.

Where a Key Service Objective has been assessed and found to have associated 'High' risk, progress against the application of risk treatment measures is to be monitored, and reported in the quarterly monitoring report in

quarters 2 and 4, however in this quarter some have been included at management's request.  
See Appendix 4

## **8.0 PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS**

During 2008/09 the service was required to undertake an Equality Impact Assessment. Progress against actions identified through that assessment, with associated High priority are to be reported in the quarterly monitoring report in quarters 2 and 4, however in this quarter some have been included at management's request.  
See Appendix 5

## **9.0 DATA QUALITY**




The author provides assurances that the information contained within this report is accurate and valid and that every effort has been made to avoid the omission of data. Where data has been estimated, has been sources directly from partner or other agencies, or where there are any concerns regarding the limitations of its use this has been clearly annotated.

## **10.0 APPENDICES**







Appendix 1- Progress against Key Objectives/ Milestones  
Appendix 2- Progress against Key Performance Indicators  
Appendix 3- Progress against Performance Indicators  
Appendix 4- Progress against Risk Control Measures  
Appendix 5 – Progress against High Priority Equality Actions  
Appendix 6- Financial Statement  
Appendix 7 - Explanation of RAG symbols

Service Plan Ref.	Objective	2008/09 Milestone	Progress to date	Commentary
OPS 1	Evaluate, plan, commission and redesign services to ensure they meet the need of vulnerable people within the local population, including those from hard to reach group (including the black and minority ethnic community)	Commission specialist housing provision for older people with higher levels of need <b>Mar 2010</b> . (AOF6 & 7).	?	Still awaiting decisions relating to Extra Care Housing funding and negotiations with providers.
		Implement of the Gold Standard and Performance Management Framework for Intermediate Care <b>Apr 2009</b> (AOF 6 &7)	✓	Completed on target
		Increase the numbers of carers provided with assessment leading to the provision of services, to ensure Carers needs are met <b>Mar 2010</b> . (AOF7)	✓	OP teams continue to identify new carers and deliver support to meet their needs, and target will be met
		Maintain the number of carers receiving a carers break, to ensure Carers needs are met <b>Mar 2010</b> . (AOF7)	✓	Carers sub group is now well established and monitors carers breaks to ensure carers needs are met.
		Comprehensive pathways for using transitional care within Halton are in place <b>Mar 2010</b> (AOF 6 &7)	✓	On target for completion

**APPENDIX ONE - PROGRESS AGAINST MILESTONES/OBJECTIVES  
Older People's Services**

Service Plan Ref.	Objective	2008/09 Milestone	Progress to date	Commentary
		Intergenerational activities project established as part of the review on early intervention and prevention aimed at improving outcomes for Older People <b>June 2009</b> (AOF 6 &7)		Successful Halloween events have taken place with more than 200 older and younger people from different communities participating. Currently a new service specification for 2010-11 is being developed to ensure delivery of newly agreed outcomes. In addition a prevention and early intervention strategy is being developed and intergenerational work is included within this strategy.
		Review of Long Term Conditions and Therapy services commissioned jointly with NHS Halton and St Helens <b>Apr 2009</b> (AOF 6 &7) NB. Deadline dependent on contribution from the Primary Care Trust		Final report recommendations accepted. Steering group of all stakeholders established. Business case in preparation and to be presented to PCT Board in February.
		Agreement with the PCT on the responsibility for Medication Prompts in place <b>Sept 2009</b> (AOF 7)		Agreement with PCT for responsibility completed.  A pilot with Northwest Medicines Management Network has been agreed to develop a re-ablement approach to supporting people with medication needs, and will commence in February.

**APPENDIX ONE - PROGRESS AGAINST MILESTONES/OBJECTIVES  
Older People's Services**

Service Plan Ref.	Objective	2008/09 Milestone	Progress to date	Commentary
OPS 2	Effectively consult and engage with older people to evaluate service delivery, highlight any areas for improvement and contribute towards the effective re-design of services where required	Review local arrangements for continuing health care following National Review <b>Apr 2009</b> (AOF 2&7) NB. Dependent on National Review being completed to timescale of Jan 2009		National review completed on target. However, significant changes within the new guidance will lead to further review of local arrangements within the next months.
		Implement revised Joint Commissioning Strategy for Older People <b>March 2010</b> (AOF 2&7)		Implementation plan on target, monitored through Older People's Local Implementation Team
		Evaluate joint service developed with Runcorn PBC <b>Mar 2010</b> (AOF 2&4)		Due to the success of the first phase, a new period of evaluation under the second phase agreed as ongoing until February 2011.
		As part of the review on early intervention and prevention aimed at improving outcomes for Older People, develop a meaning engagement strategy with Service Users <b>June 2009</b> (AOF 7)		First draft of the prevention and early intervention strategy will be complete in January 2010.
		Establish Social Care element of the 'Virtual Ward' established with Widnes PBC <b>March 2010</b> (AOF 2)		Still on target for completion as above.
OPS 3	Ensure that there are effective processes and services in place to enable the Directorate	Analyse need and submit bids to DOH, Housing Corporation or other pots for at least one extra care development to provide additional extra care tenancies in Halton <b>Mar 2010</b> . AOF 6&7)		Maintained regular contact with RSL partners to progress a number of options for the development of extra care housing. On target to submit two bids to HCA before March 10.

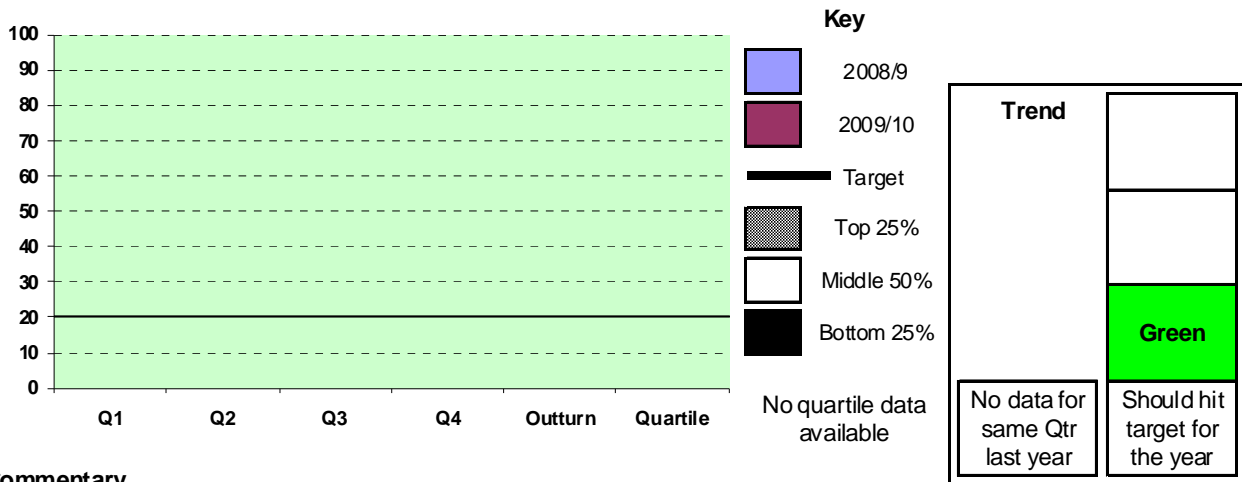
**APPENDIX ONE - PROGRESS AGAINST MILESTONES/OBJECTIVES  
Older People's Services**

Service Plan Ref.	Objective	2008/09 Milestone	Progress to date	Commentary
	to manage, procure and deliver high quality, value for money services that meet peoples needs	Implement new residential and domiciliary care contracts for older peoples services <b>Sept 2009</b> (AOF 6&7)	<input checked="" type="checkbox"/>	Complete.

**APPENDIX ONE - PROGRESS AGAINST MILESTONES/OBJECTIVES  
Older People's Services**



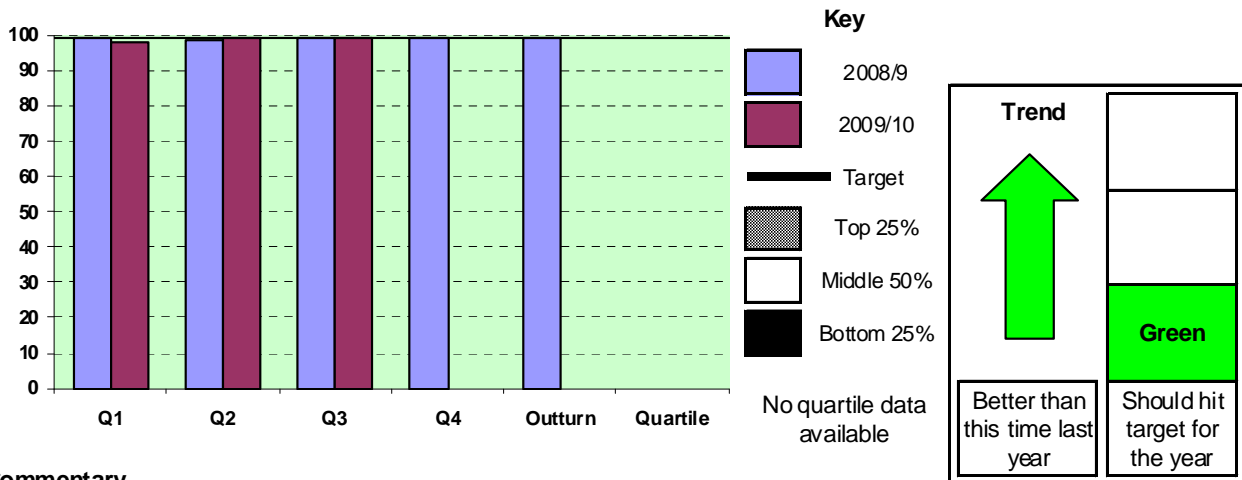
OP LI3 Unit cost of home care for adults and older people



**Commentary**

There have been no re-imbursable delays during this period

OP LI7 Percentage of people receiving a statement of their needs and how they will be met.

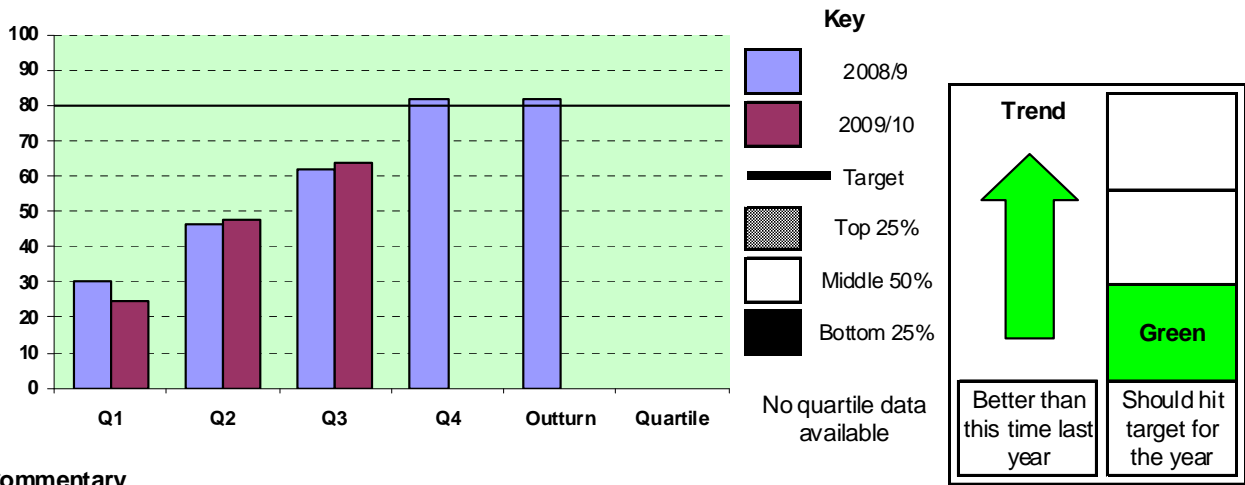


**Commentary**

99.54% of people in receipt of services have been given a statement of their needs and how they will be met. Target already achieved, however, monthly exception reports are still produced for operational teams to action of those clients who are not in receipt of their statement of needs.

OP LI8

**Clients receiving a review as a %age of adult clients receiving a service**



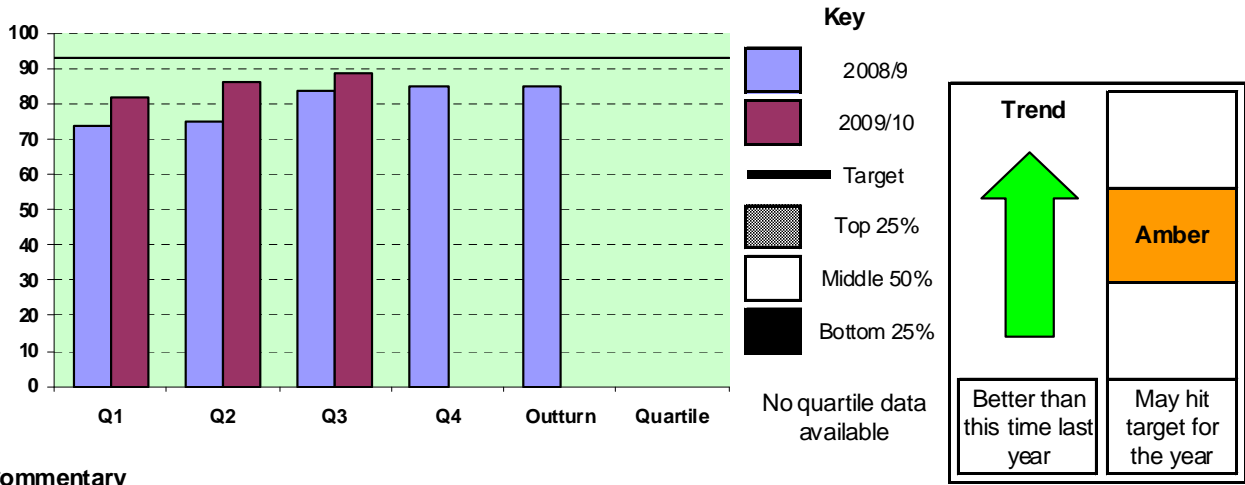
**Commentary**

63.61% of clients receiving services have been reviewed so far. In order to ensure the target will be met at year end, monthly exception reports of outstanding reviews are sent to operational teams to action.

OP LI9

**Percentage of items of equipment delivered within 7 working days**

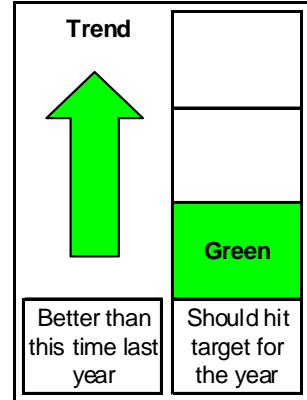
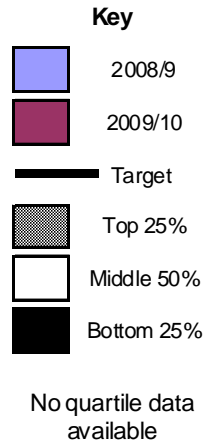
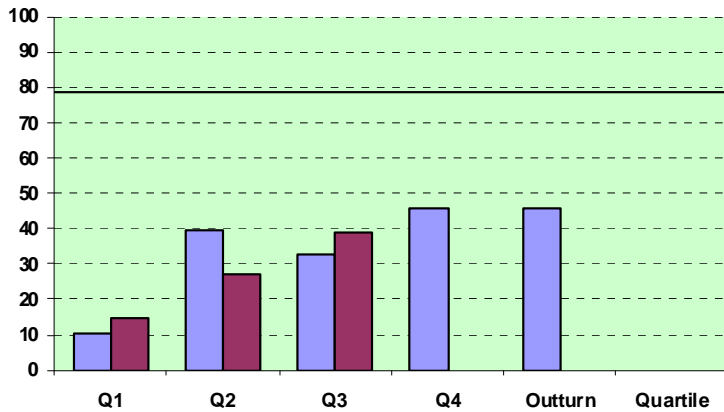
Higher figures represent better performance



**Commentary**

OP LI10

**Admissions of supported residents aged 65+ to permanent residential/nursing care (per 10,000 population)**

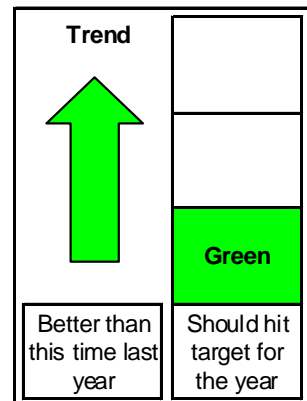
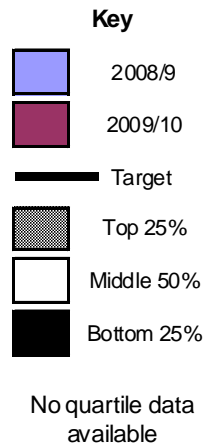
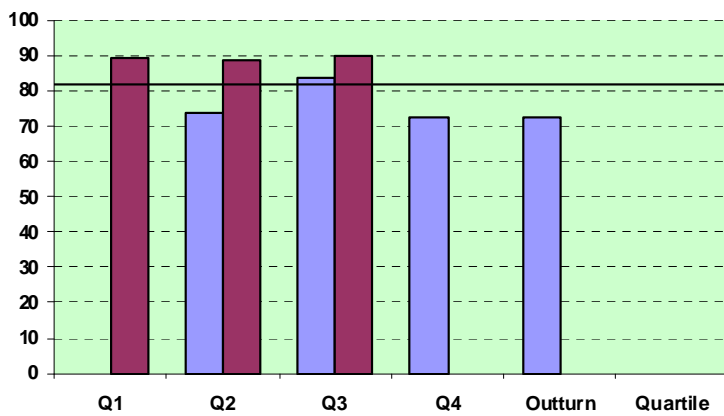


**Commentary**

To date, 65 older people and 1 adult have been admitted to permanent residential and nursing care. All clients are allocated a single room.

OP NI 132

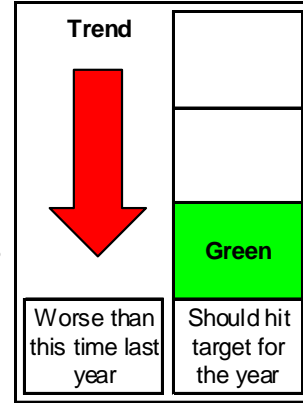
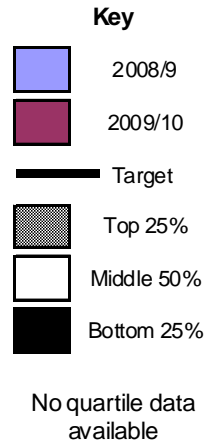
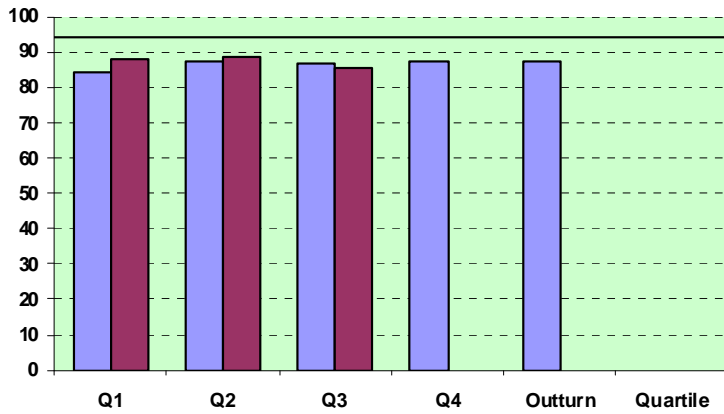
**Timeliness of social care assessment DH DSO**



**Commentary**

Target exceeded. However, final year end figure is determined by a file check which is ongoing

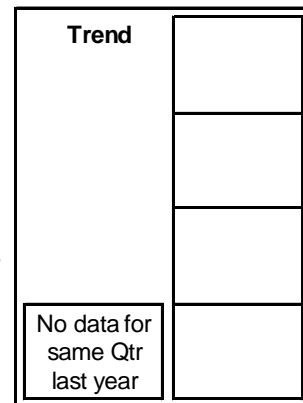
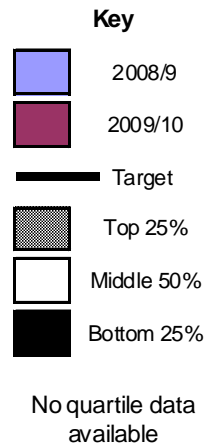
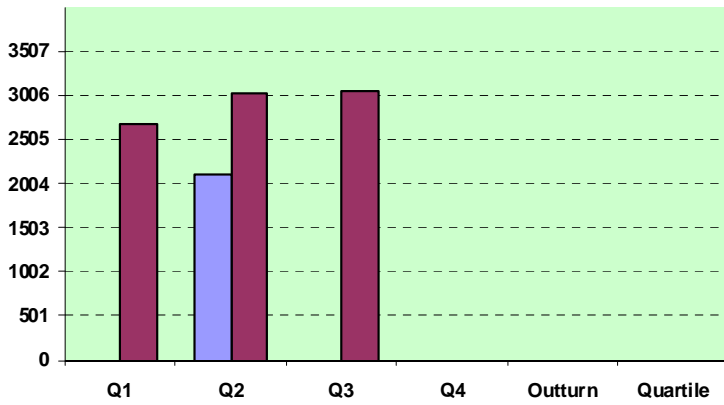
OP NI 133 **Timeliness of social care packages DH DSO**



**Commentary**

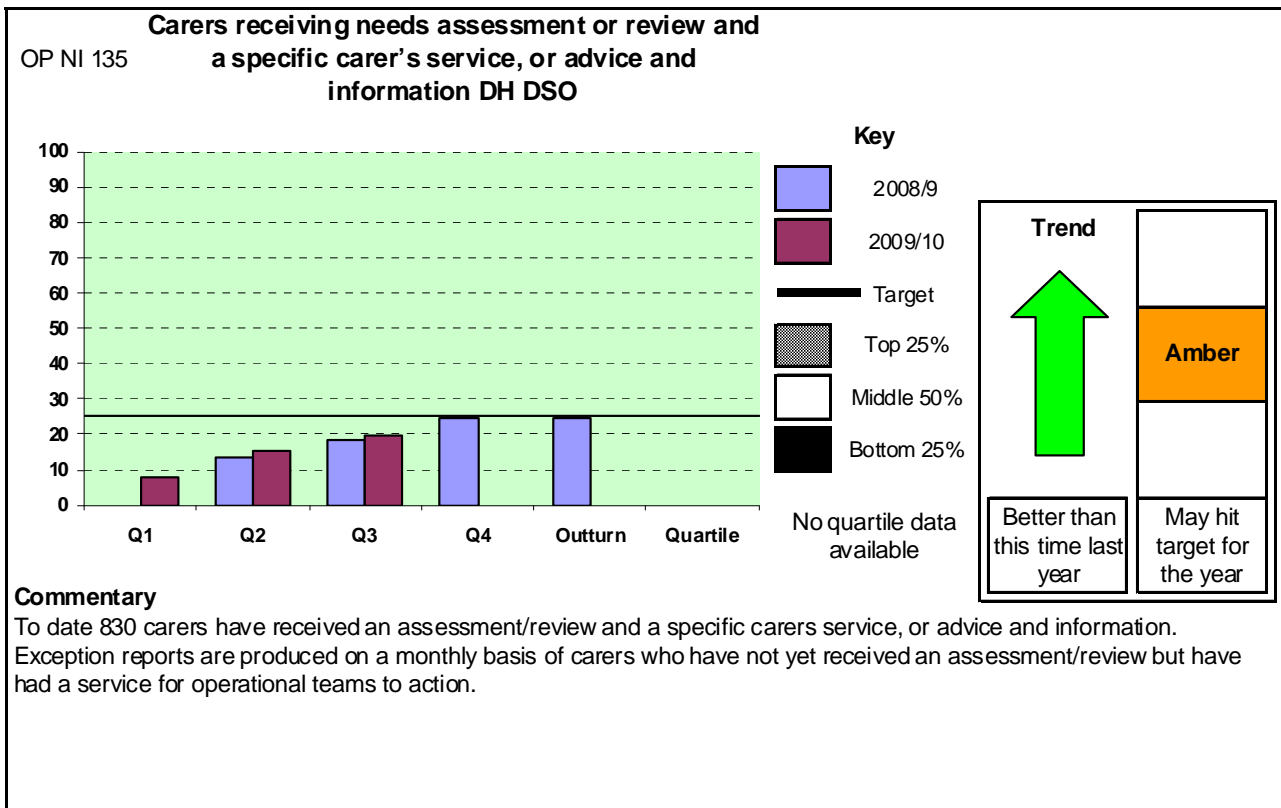
Final year end figure is determined by a file check which is ongoing

OP NI 136 **People supported to live independently through social services (all ages) PSA 18**



**Commentary**

Q3 performance has increased from Q2 performance. Helped to live at home continues to be good. No target has been set for 2009/10, therefore a traffic light indicator cannot be allocated.



The following KPIs are not shown in tabular form for the reasons stated below: -

**NI 131** Delayed transfers of care;  
Data derived from health, which is not yet available

**NI 125** Achieving independence for Older People through rehabilitation/Intermediate Care;  
Indicator derived from a sample was undertaken in December. Figure will not be known until year end.

Ref.	Description	Actual 2008/09	Target 2009/10	Quarter 3	Progress	Commentary
<b>Quality</b>						
OP LPI 4	Ethnicity of older people receiving assessment	1.7	1.5	0.71	?	Out of 1112 clients who have received an assessment this year, 4 clients have an ethnic origin other than white. Given the small proportion of ethnic minority clients, this indicator is fluctuation to change.

**APPENDIX THREE - PROGRESS AGAINST OTHER PERFORMANCE INDICATORS  
Older People's Services**

Key Objective	Risk Identified	Risk Treatment Measures	Target	Progress	Commentary
OPS3	Availability of suitable land and funding to develop extra care housing	<ul style="list-style-type: none"> <li>Development of alternative community services</li> </ul>	March 2010	<input checked="" type="checkbox"/>	A number of potential sites have been identified and work is ongoing to work up scheme proposals for submission to the Homes & Communities Agency (HCA).

**APPENDIX FOUR - PROGRESS AGAINST RISK CONTROL MEASURES**  
**Older People's Services**

Policy/Service	HIGH Priority Actions	Target	Progress	Commentary
Housing	Private Sector Housing Conditions survey to be carried out, with resulting data disaggregated and analysed for race and disability	March 2010	<input checked="" type="checkbox"/>	Survey completed. Draft report on key findings to be completed by April 10.

**APPENDIX FIVE – PROGRESS AGAINST HIGH PRIORITY EQUALITY ACTIONS**  
**Older People’s Services**



## HEALTH & COMMUNITY – OLDER PEOPLE

### Revenue Budget as at 31st December 2009

	Annual Revised Budget	Budget To Date	Actual To Date	Variance To Date (overspend)	Actual Including Committed Items
	£000	£000	£000	£000	£000
<b><u>Expenditure</u></b>					
Employees	6,140	4,631	4,638	(7)	4,781
Premises Support	215	161	162	(1)	162
Other Premises	58	39	25	14	51
Food Provisions	255	191	155	36	185
Supplies & Services	467	125	120	5	267
Transport	242	123	115	8	115
Departmental Support Services	1,704	0	0	0	0
Central Support Services	646	221	476	0	476
Community Care:					
Residential Care	7,115	4,106	3,484	622	3,484
Home Care	2,360	1,416	1,206	210	1,206
Supported Living	355	213	249	(36)	249
Day Care	29	22	25	(3)	25
Direct Payments	351	211	179	32	179
Other Agency	2,591	10	9	1	9
Asset Charges	52	0	0	0	0
<b>Total Expenditure</b>	<b>22,580</b>	<b>11,724</b>	<b>10,843</b>	<b>881</b>	<b>11,189</b>
<b><u>Income</u></b>					
Residential Fees	-2,426	-1,820	-1,592	(228)	-1,592
Fees & Charges	-1,081	-811	-825	14	-825
Preserved Rights Grant	-91	-72	-73	1	-73
Supporting People Grant	-857	-430	-430	0	-430
PCT Reimbursement	-21	-10	-10	0	-10
Intermediate Care PCT Contribution	-2,961	-1,920	-1,916	(4)	-1,916
PCT Contribution to Care	-35	-18	-21	3	-21
Joint Finance – PCT	-33	-8	-9	1	-9
Adult Stroke Services Grant	-170	-170	-170	0	-170
Community Roll Out Grant	-18	-17	-18	1	-18
Other Income	-325	-325	-320	(5)	-320
<b>Total Income</b>	<b>-8,018</b>	<b>-5,601</b>	<b>-5,384</b>	<b>(217)</b>	<b>-5,384</b>
<b>Net Expenditure</b>	<b>14,562</b>	<b>6,123</b>	<b>5,459</b>	<b>664</b>	<b>5,805</b>

#### **Comments on the above figures:**

In overall terms revenue spending at the end of quarter 3 is under budget profile by £664k. This is due to expenditure on the community care budget continuing to be lower than anticipated at this point of the financial year as service users are increasingly being supported at home using home care and telecare services. This has resulted in a reduction in residential and nursing care expenditure and income.

The continued success in gaining continuing health care funding, investment in re-enablement services and a reduction in the number of high cost packages during quarter 3 means expenditure on the community care budget is significantly less than expected. However, the Primary Care Trust is currently reviewing some CHC funded packages, which may lead to demands for funding from the Local Authority. This budget will continue to be scrutinised closely throughout the remaining quarter of the financial year.

The under spend on employees costs has reduced considerably from quarter 2 due to the payment of redundancy costs to the Operational Director. This budget is expected to balance at year-end.




Food provisions budget is under budget profile due to the Meals on Wheels service delivering more hot meals and tea packs resulting in additional income.

## Older People

### Capital Budget as at 31st December 2009

	2009/10 Capital Allocation £000	Allocation To Date £000	Actual Spend To Date £000	Allocation Remaining £000
Redesign Oakmeadow Phase 2	60	30	41	19
Major Adaptations for Equity release/Loan Schemes	100	0	0	100
ILC market garden canopy	16	16	13	3
Bridgewater	2	2	0	2
<b>Total Spending</b>	<b>178</b>	<b>48</b>	<b>54</b>	<b>124</b>

The RAG symbols are used in the following manner:

	<u>Objective</u>	<u>Performance Indicator</u>
<b><u>Green</u></b>	 Indicates that the <u>objective is on course to be achieved</u> within the appropriate timeframe.	Indicates that the <u>target is on course to be achieved</u> .
<b><u>Amber</u></b>	 Indicates that it is <u>unclear at this stage whether the objective will be achieved</u> within the appropriate timeframe.	Indicates that it is either <u>unclear</u> at this stage or too early to state whether the target is on course to be achieved.
<b><u>Red</u></b>	 Indicates that it is <u>highly likely or certain that the objective will not be achieved</u> within the appropriate timeframe.	Indicates that the <u>target will not be achieved</u> unless there is an intervention or remedial action taken.