Care Funding Calculator – Funding Request £95,000

Please note: Capital Ambition does not support projects that benefit single authorities. Proposals should usually be joint submissions or be submitted by a lead partner on behalf of others. In exceptional circumstances Capital Ambition may support a bid but it must demonstrate specifically the value of outcomes and learning and how it can then be transferred to other organisations.

Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Created</th>
<th>Reasons for/Summary of Changes</th>
<th>Revised by</th>
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<td><strong>Medium Project Proposal – 50,001 to 149,999</strong></td>
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<tr>
<td><strong>Title of Project:</strong> Learning Disability and Physical Disability Care Funding Calculator</td>
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<tr>
<td><strong>Project Manager Name:</strong> Lzetwicia Oscar-Jackman</td>
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<td><strong>Lead Authority:</strong> Merton Council</td>
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<tr>
<td><strong>Project Manager Contact Details:</strong> Tel: 020 8545 3625, Email: <a href="mailto:Lzetwicia.oscar-jackman@merton.gov.uk">Lzetwicia.oscar-jackman@merton.gov.uk</a></td>
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<td><strong>Planned Start date:</strong> 01 April 2010</td>
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<td><strong>Amount of Funding Requested Year 1:</strong></td>
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<td><strong>Total Funding Requested:</strong> £95,000</td>
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<td><strong>Planned End date:</strong> 31 March 2011</td>
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<td><strong>Amount of Funding Requested Year 2 (if applicable):</strong> None</td>
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<td><strong>Other Partners Involved in Submission of Bid:</strong></td>
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<tr>
<td><strong>Note:</strong> Please List partner organisations that are involved in the submission of the bid (i.e joint proposers).</td>
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<tr>
<td><strong>This bid is made on behalf of all 33 London boroughs who are partners to the Care Funding Calculator Project through the Joint Improvement Programme:</strong></td>
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<tr>
<td>Barking and Dagenham, Barnet, Bexley, Brent, Bromley, City of London, Camden, Croydon, Ealing, Enfield, Greenwich, Hackney, Hammersmith and Fulham, Haringey, Harrow, Havering, Hillingdon, Hounslow, Islington, Kensington and Chelsea, Kingston, Lambeth, Lewisham, Merton, Newham, Redbridge, Richmond, Southwark, Sutton,</td>
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</table>
Section 1 Background/Context

Describe the circumstances relevant to the project and provide a brief assessment of how the business needs are currently being met or not met. Please briefly outline how this project will bridge the gap between the current situation and the stated objectives, setting out why the project is needed and what it will do to meet that need.

The London Project, aims to deliver fair funding for residential care and support for people with learning difficulties and disability in residential care. The initial phase, funded by Capital Ambition, is being rolled out successfully in 2009/10. The Project has gathered momentum and Boroughs can now report significant savings (refer Appendix 1 – London Savings Spreadsheet). Borough Engagement with the Care Funding Calculator Tool is also increasing positively (refer Appendix 2 – Progress Chart). We are now at a point where most boroughs are engaged in the project and receiving training in the CFC’s use, but are in only the early stages in terms of full realisation of savings. There is also scope for increasing savings through extending the use of the CFC to other care groups such as physical disabilities.

Boroughs have requested the continuation of support and coordination supported by the Learning Disabilities Commissioning Board for Phase II to Project bid.

The transformation of social care services into Personalisation is enabling London boroughs to seek ways to enable individuals to live independently. The providers are moving to Supported Living from Residential Care. The Care Funding Calculator Independent Living Tool, rolled out late in Phase I (November 2009), will be used by people with individual budgets. This project will ensure access by all London Boroughs to training to ensure fair funding packages of care are available to support service delivery cost effectively in physical and learning disabilities.

Considering the increased financial pressures on Councils, the Care Funding Calculator allows both provider and commissioning staff in Local Authorities to assess fair prices for residential care and supported living arrangements for service users. Boroughs have recognised the value of the Care Funding Calculator Tool in supporting their efficiency drives.

The outcome of the first Project (Phase I) deliverables were:

- Minimum of 20 Borough-wide training sessions of the Care Funding Calculator Tool. 21 delivered with a further 9 up to 05 March 2010
- Evidence of Borough savings and efficiencies collated and reported on a bi-monthly basis. Significant savings reported by six
Boroughs up to and including 31 December 2009 were £2,038,363.75

- Demonstrations/promotional visits to 80% of London Boroughs
- Borough Engagement Grid produced and updated on a quarterly basis
- Bi-monthly London Champions meetings established
- 31 out of 33 Boroughs engaged with the Project. 18 Boroughs have high-level sign ups with six out of the 18 actively using the Care Funding Calculator Tool for over six months

The Project delivered the following added value outcomes:

- Creation of a London Care Placements website
- Bespoke London version of the National Savings Spreadsheet rolled out London-wide
- Pool of accredited London Care Funding Calculator trainers
- Roll-out of effective demonstration programme to engage senior managers within the London Boroughs

Deliverables from April 2010 to March 2011 are:

- Enhance coordination and support London Boroughs
- Establish delivery of the Care Funding efficiencies and savings for the London Region for learning disabilities and physical disabilities in residential, supported and independent living
- Further support Boroughs to demonstrate achievable savings through using a database, London Savings Spreadsheet, that Boroughs are required to populate and submit returns to the London Region Care Funding Calculator Coordinator periodically
- Establish a dedicated pool of London trainers available in each borough to support use of the Care Funding Calculator training roll-out across the London Region and deliver further savings
- Roll-out negotiation training for London Champions to cascade down to commissioners and brokers within each borough
- Provide support, build expertise and facilitate the use of the Care Funding Calculator across Learning Disabilities and Physical Disabilities and the Independent Living Tool
- Capture issues with providers and facilitate a coordinated strategy via the Learning Disabilities Commissioning Board

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<th>Section 2  Project Information</th>
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</table>
Section 2 Project Information

2.2 Is this bid for funding linked to a previous bid or for work delivered in an earlier phase?

If yes, please provide a brief explanation about the work previously delivered and the costs. Please include the project reference number (URN), project dates, outputs, outcomes and funding awarded by Capital Ambition.

**Note:** You can include information as an appendix if necessary.

The Phase I Project was efficient through prudent financial management that has allowed the continuation of the Project until June 2010.

Outcomes achieved:

- Minimum of 20 Borough-wide training sessions of the Care Funding Calculator Tool. 21 actually delivered with a further 9 planned up to 05 March 2010
- Evidence of Borough savings and efficiencies collated and reported on a bi-monthly basis. Significant savings reported by six Boroughs up to and including 31 December 2009 were £2,038,363.75
- Demonstrations/promotional visits to 80% of London Boroughs
- Borough Engagement Grid produced and updated on a quarterly basis
- Bi-monthly London Champions meetings established
- 31 out of 33 Boroughs engaged with the Project. 18 Boroughs have high-level sign ups with six out of the 18 actively using the Care Funding Calculator Tool for over six months
- Creation of a London Care Placements website
- Bespoke London version of the National Savings Spreadsheet rolled out
- Pool of accredited London Care Funding Calculator trainers
- Roll-out of effective demonstration programme to engage senior managers within the London Boroughs
## Section 2 Project Information

### 2.3 What are the (measureable) objectives of the project?

Please provide a one sentence statement, or a number of statements, starting with the word ‘to’.

**Example:** staying with the example in aim in 2.1 the objectives could be:

- To provide training on core job skills and job search skills to (x number) of people by January 2011.
- To offer supported work placements to (x number) of people by February 2011.

The measurable objectives of Phase II of the Project are as follows:

- To support 2 remaining late-starter authorities to reach the same level as the other 31 London Boroughs by July 2010
- To roll-out training and support to 33 Boroughs in using the London Savings Spreadsheet database, that Boroughs are required to populate and submit to the Project Manager on a monthly basis to demonstrate achievable savings by December 2010
- To train and establish a dedicated pool of 5 London trainers to continue the Care Funding Calculator training roll-out across the London Region by May 2010
- To roll-out negotiation training for 33 London Champions to cascade down to commissioners and brokers within their Local Authorities by July 2010
- To provide support, build expertise and facilitate the integration of the Care Funding Calculator Tool within Learning Disabilities, Physical Disabilities and the Independent Living sectors across all 33 Boroughs’ mainstream budgets by March 2011
## Section 2  Project Information

### 2.4 How does the proposed project address one (or more) of Capital Ambition’s themes and funding priorities/criteria?

How will learning, products and outcomes have relevance and value beyond those organisations directly involved in the project. Identify areas where there are opportunities for skills and capacity building.

**Note:** Capital Ambition themes are: Connected London, Delivering Together, Raising the Bar and Developing Capability and priorities set out in CSR 2007, Local Area Agreements, National Indicator 179 and National Improvement and Efficiency Strategy themes of innovation, Empowerment, Economic Renewal and Value for Money.

The proposed Project addresses Capital Ambition’s theme – “Delivering Together” by providing an integrated way of working with the NHS and Providers and continuing care for people with Learning and Physical Disabilities.

There will be opportunities to develop staff skills via accredited courses in Train the Trainer and Negotiating Skills and the creation, support and development of “super users” in each Borough to cascade down training and negotiating skills to other key staff members thus resulting in substantial efficiencies and savings for each London Borough.

Building capacity within the Learning Disability and Physical Disability Sectors will ensure the delivery of cost-effective, efficient and appropriate services to end-users.
Section 2 Project Information

2.5 What benefits are sought from running this project?

Please be specific and quantify in terms of cashable savings (what, how much over what period?), efficiency gains (how, impact?), Cost avoidance (what, how much over what period?) and Capacity Building.

Note: These headings not exhaustive and additional headings can be added where necessary.

Learning from elsewhere indicates that there are still substantial savings to be made.

The South East Region have reported savings in excess of £4.5 million and an average saving where the Tool has been implemented and used of 15% since 2007 to date. This has primarily been on new placements but there is increasing movement toward Local Authorities using the Tool on existing placements.

Significant moves have also been made towards joint renegotiation of placements in neighbouring authorities where the same provider is being used. All these initiatives have increased the average level of saving from approximately 12% when the South East Region first started using the Care Funding Calculator to an average of 15% and with reports of 50% in some cases.

It is anticipated that a number of residential care placements will decrease as Direct Payments, Individual Budgets, Supported Living and Adult Placements become the preferred form of support for those with low to medium support needs. However, the average cost of a residential placement is rising due to the higher level of support by individuals using care homes. Demographic indicators show that numbers requiring such higher levels of support will continue to increase.

Savings achieved at the point of placement will apply over the life of the placement. Residential placements can last as long as the lifetime of an adult, thus any saving negotiated at the start of the placement, will represent a significant saving over the life of the placement.

Despite professed moves away from residential are as Local Authorities move towards Direct Payments, Supported Living and Individualised Budgets, the most recent PSSEX returns show that an average of 53% of Learning Disabilities spend is on residential care – higher than the 50% average of the last 10 years.
# Section 2  Project Information

*We require clear information about projected return on investment for projects that claim to deliver efficiency savings. Please use Mietool (or a robust equivalent) to support your savings estimates, and provide the supporting documentation. If you do not have any Mietool trained staff please see the following website for further details. [http://www.londoncouncils.gov.uk/capitalambition/resourcesandperformance/bpcasestudies/mietool.htm](http://www.londoncouncils.gov.uk/capitalambition/resourcesandperformance/bpcasestudies/mietool.htm)*

## 2.6 Are there any partners involved in the project? If so, how will they contribute to its success?

**Note:** Please provide the names and roles of any partner organisation involved in the delivery of this project, specifying the role they will play (e.g. responsible for delivering a specific work stream, match funding etc).

33 London Boroughs, London Councils and the London Borough of Merton (Host Borough)
<table>
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<tr>
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<th>What are the outcomes of the project?</th>
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<td>Note:</td>
<td>What changes or effects should come about as a result of the project?</td>
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<td>2.7</td>
<td>Continue to coordinate and support 33 London-based Boroughs particularly late-starter authorities</td>
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<td>Establish delivery of the Care Funding efficiencies and savings for the London Region (£11,211,000 anticipated) by March 2011</td>
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<td>Support Boroughs to demonstrate achievable savings (£11,211,000 anticipated across 33 Boroughs) through using a database, London Savings Spreadsheet, that Boroughs are required to populate and submit returns to the London Region Care Funding Calculator Coordinator periodically</td>
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<td>Establish and train a dedicated pool of 5 London trainers to continue the Care Funding Calculator training roll-out across the London Region therein making further savings by not having to outsource trainers nationally and thereby pay for hotel accommodation and travel and subsistence costs</td>
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<td>Roll-out negotiation training for 33 London Champions to cascade down to commissioners and brokers within their Local Authorities</td>
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<td>Provide support, build expertise and facilitate the integration of the Care Funding Calculator Tool within Learning Disabilities, Physical Disabilities and the Independent Living sectors across 33 London Boroughs’ mainstream budgets</td>
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<td>Capture issues with providers and facilitate a coordinated strategy via the Learning Disabilities Commissioning Board</td>
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## Section 2 Project Information

### 2.8 What outputs will the project deliver and how will you ensure that they are fit for purpose?

Outputs should be tangible delivered by the project. Each output should be linked to one of the outcomes shown above. Please indicate how you will ensure that they are fit for purpose.

**Examples:** toolkit, procedure manual, training strategy.

- Facilitating online and secure discussion forums on the London Care Placements website which was set up in Phase I and will need web enhancement and development in Phase II
- Shared information and joint working with London Boroughs through the London Champions Group bi-monthly meetings
- Negotiating Strategy skills training rolled out across all London Champions
- Certificates of Completion awarded to each Care Funding Calculator training participant
- Revised/bespoke Care Funding Calculator User Guide with visual aids

### 2.9 Please describe any project dependencies

Dependencies could be internal or external and may include other projects.

- Introduction and implementation of the Care Funding Calculator across 33 London Boroughs
- Embedding strong practice through enhancement of officers' negotiating skills

### 2.10 Please describe the management (Governance) arrangements that will be put in place to govern this project (please include accountabilities).

Please show the parties who will form the governance structure for the project. As a minimum, you will need a Project Sponsor, Project Board and a Project Manager to be included in your governance structure.

- **Project Sponsor:** Simon Williams, Director of Community and Housing – London Borough of Merton and Chair of the Learning Disabilities Commissioning Board
- **Project Board:** Learning Disabilities Commissioning Board
- **Project Manager:** Lzetwicia Oscar-Jackman, London Region Care Funding Calculator Coordinator

### 2.11 How will the project be resourced?

Are there existing operational resources or have specific funds been allocated?

**Note:** Include all internal, external, consultants and/or working groups that will be required for the project.

- Project Manager, 5 accredited Borough-based trainers, London Champions Group and trainees
## Section 2 Project Information

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| 2.12 | **What are the key risks (barriers to success) of this project and how will you minimise them? What is your strategy for managing, reporting and escalating risks during the life of the project?**  
You should maintain a full risk and issues log which Capital Ambition will ask to see periodically during the lifecycle of the project. Please attach a copy of your risk register or list key risk (with a 1-4 rating) and the mitigating actions to control the risks. |
|   | **Note:** A template for a Capital Ambition risk register is available from the Capital Ambition Programme Office  
Please see the attached Risk Register (Appendix 3) submitted to Capital Ambition in March 2010 |
| 2.13 | **Please describe the key assumptions made during the planning phase.**  
Examples of assumptions might be "Budgets and resources will be available when needed." or "new staff will have been employed by the time the implementation phase begins."

Project Manager for Phase I will continue as Project Manager for Phase II |
| 2.14 | **Please describe key constraints identified during the planning phase.**  
Examples of constraints might be the availability of resources (e.g. amount of money/staff/equipment available) and time (e.g. an inmoveable deadline such as 2012 Olympics).  

Progress will be subject to staff availability for training delivered and support from Senior Management in terms of resources, allowing staff the time to train and implementation of the Care Funding Calculator Residential Care and Independent Living Tools.  

Training already delivered in Phase I will be consolidated and further enhanced through Negotiation Strategy training and hands-on support received from the Project in Phase II. |
## Section 2  Project Information

### 2.15 What are the reporting arrangements for the project and who will the report go to?
As a minimum, a monthly Capital Ambition Highlight Report should be completed and sent to the Capital Ambition Programme Management Office at CA-PMO@londoncouncils.gov.uk

- Capital Ambition – Monthly Highlight Report, Risk Register
- Learning Disabilities Commissioning Board – Bi-monthly report and update

### 2.15 How will the success of the project be measured?
Each measure should be linked to one or more target outcomes.

The measurable objectives of Phase II of the Project are as follows:

- To support 2 remaining late-starter authorities to reach the same level as the other 31 London Boroughs by July 2010
- To train and support all 33 Boroughs in using the database, London Savings Spreadsheet, that Boroughs are required to populate and submit to the Project Manager on a monthly basis to demonstrate achievable savings by December 2010
- To train and establish a dedicated pool of 5 London trainers to continue the Care Funding Calculator training roll-out across the London Region by May 2010
- To roll-out negotiation training for 33 London Champions to cascade down to commissioners and brokers within their Local Authorities by July 2010
- To provide support, build expertise and facilitate the integration of the Care Funding Calculator Tool within Learning Disabilities, Physical Disabilities and the Independent Living sectors across all 33 Boroughs’ mainstream budgets by March 2011
### Section 2  Project Information

#### 2.16 How will you measure the Equalities Impact of the project?

What steps have you taken to assess the equalities impact of this project?

**Note:** You should carry out a relevance assessment before submitting this proposal. Any adverse impacts identified should be outlined in the proposal along with mitigating actions.

The project will have a positive impact on equalities through promoting funding based on the needs of service users rather than whatever prices are offered by providers.

#### 2.17 Legacy Planning - What will be the legacy of the project?

Describe how will the work undertaken during the running of this project will be sustained or carried on once the project has been completed.

**Note:** Please provide details on how the project outcomes will be sustained post project completion.

- Dedicated pool of 5 London trainers
- Savings from Learning Disabilities and other residential care placements
- People trained in negotiating skills

#### 2.18 How will the lessons learned be captured?

Capital Ambition requires that you keep a lessons learned log to be shared with others who may run similar projects in the future.

**Note:** *You will be asked to complete a project closure report including lessons learned, and may be asked to present your learning as the project develops*

Regulated by London Champions Group and the Learning Disabilities Commissioning Board.
### Section 3 Key Activities and Milestones

Please list the key activities, scheduled start date, scheduled finish date and who has been assigned responsibility

<table>
<thead>
<tr>
<th>Description</th>
<th>Responsible Officer (if known)</th>
<th>Scheduled Start</th>
<th>Scheduled Finish</th>
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<tbody>
<tr>
<td>To support 2 remaining late-starter authorities to reach the same level as the other 31 London Boroughs</td>
<td>Project Manager</td>
<td>April 2010</td>
<td>July 2010</td>
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<tr>
<td>To roll-out negotiation training for 33 London Champions to cascade down to commissioners and brokers within their Local Authorities</td>
<td>Project Manager</td>
<td>May 2010</td>
<td>July 2010</td>
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<tr>
<td>To continue Care Funding Calculator training across the London Region by equipping Borough staff with the skills to deliver in-house training as part of core duties</td>
<td>Project Manager and accredited trainers</td>
<td>April 2010</td>
<td>March 2011</td>
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<tr>
<td>To train and support 33 Boroughs in using the London Savings Spreadsheet database, that Boroughs are required to populate and submit to the Project Manager on a monthly basis to demonstrate achievable savings</td>
<td>Project Manager and London Champions Group</td>
<td>April 2010</td>
<td>December 2010</td>
</tr>
<tr>
<td>To provide support, build expertise and facilitate the integration of the Care Funding Calculator Tool within Learning Disabilities, Physical Disabilities and the Independent Living sectors across all 33 Boroughs' mainstream budgets</td>
<td>Project Manager, London Champions Group and accredited trainers</td>
<td>April 2010</td>
<td>March 2011</td>
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<tr>
<td>To develop the Care Funding Calculator web pages on the London Care Placements website</td>
<td>Project manager</td>
<td>July 2010</td>
<td>December 2010</td>
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</tbody>
</table>
Thank you for completing this proposal. We are happy to receive a copy by email to the Capital Ambition Programme Management Office – CA-PMO@londoncouncils.gov.uk
Please sign and send hard copy to (and for further information):

Capital Ambition Programme Management Office
Capital Ambition
London Councils
59½ Southwark Street
London
SE1 0AL

Signed…………………………………………………………………………..Date………………………………

Print Name ……………………………………………….Position………………………………………………..

Before submission please ensure this proposal has the support of the Chief Executives of all joint-proposers, and where appropriate Elected Members.