



# Getting Personal – Getting Real

The initial impact of the  
personalisation agenda in  
Norfolk and the way forward

This research was funded by:



This research has been compiled in association with:



**Norfolk** County Council

---



# Getting Personal – Getting Real

The initial impact of the personalisation agenda in Norfolk and the way forward

## **FINAL REPORT**

May 2009

**Shirley Magilton**

**(in association with Bill Albert)**

## SUMMARY

# ACKNOWLEDGEMENTS

---

**Norfolk Specialist Partnership<sup>1</sup>:** Age Concern Norfolk, Benjamin Foundation, Big C, Children and Young People's Voluntary Forum, Community Connections, Community Music East, Space East, Norfolk Coalition of Disabled People, Norfolk Council for Voluntary Youth Services, Norwich and Norfolk Race Equality Council.

<sup>1</sup> NSP consists of specialist support organisations in Norfolk, established to support frontline agencies to respond more effectively to the needs of service users, to improve their quality of service design, implementation and delivery and to develop an effective, forward thinking response to the challenges posed by the radical transformation [of health and social care] services.

# FOREWORD

---

The formation of the Norfolk Specialist Partnership is a very welcome development, and a clear sign of the ambition of Norfolk's Third Sector for personalisation to be an opportunity to improve services.

This important report provides a unique perspective, and a model, for how public service partners can collaborate on that improvement, recognise and debate the risks of change, co-design new business models for our service providers, but keep service users and their carers at the centre of our thinking. Together public sector and third sector organisations need to listen to our customers and respond more effectively to their needs; we must not assume that we know what they want because our organisations have community roots.

The personalisation agenda for the reform of health, housing and social care is proceeding fast. It is over a year since the release of Putting People First with its emphasis on better universal services, greater choice and control for people using services, earlier intervention and prevention, and building social capital. In a recent review of progress the view from Government was a call to 'put our foot on the gas.'

All public services need to acknowledge that people using services are often paying for those services – through taxation or charges – and their expectations are rising fast. They need better information, advice and advocacy about using services.

So, the pace of change, the rising expectations, the public, business and charitable sector financial constraints over the next five years against sharply rising service demand; this means that all public services, statutory and community, will face hard decisions that minimise costs and increase the value that more personalised services represent for customers. We may need to reprioritise what we want to do. We must work on these dilemmas together with, as this report outlines, confidence and creativity.

Changing our attitudes and working differently costs us nothing. We need to widen out thinking beyond organisational boundaries to achieve personalisation. Employment, leisure, culture and learning are as important as housing, care and health to people's whole lives. We need to consider what statutory and community services could be more integrated for the benefit of customers, and still be true to our purposes. We need to see and respond to the increasing diversity of Norfolk.

Above all, we need to value, respect and nurture Norfolk's Third Sector, recognising the value of community development and representation, and acknowledging that this does not happen by chance but through the deliberate efforts of people, making a choice. We have to work together to increase the likelihood of that continuing, whilst increasing the pace personalisation.

**James Bullion**

Assistant Director, Community Care, Norfolk County Council Adult Social Services

## 1.0 REPORT SUMMARY

---

The 'Transformation Agenda' of which Personalisation is a part, represents a very significant shift in central government policy<sup>2</sup> regarding the provision of social care, as well as health and housing from a *statutory-service led* to a *service user led* framework. This promises choice and ownership for the service user in the planning, purchasing and delivery of their own care and support.

For the statutory sector, third sector and service users, the implications of this change include the creation of great possibilities but also significant problems.

To enable agencies in Norfolk to embrace confidently and creatively new ways of working, with service users at the heart of provision, Norfolk Specialist Partnership commissioned this report. This involved research and consultation carried out between January and May 2009, including mapping current understanding and progress in Norfolk and developing two models to support the changes ahead. Although health and housing have been surveyed, because the impact of Personalisation has been limited almost entirely to social care, this has been the primary focus of the work. The emphasis throughout has been on operational, transparent and evidence-based practice.

Information gathering in the first part of the investigation was based on four main questions:

- What are the key issues for service users regarding their understanding and response to the Personalisation Agenda?
- What are the main challenges in delivering self-directed-support (SDS) and person-centred-services (PCS) and how can these difficulties be overcome?
- What practical model(s) might be most effective in offering SDS and PCS when practically implemented across diverse beneficiary groups and what will be the impact on providers?
- What are the implications on the workforce and skills across the provider base in delivering the outcomes sought through PCS?

---

<sup>2</sup> Department of Health (2007) Putting People First: a shared vision and commitment to the transformation of Adult Social Care London

## 2.0 MAPPING FINDINGS

---

The mapping exercise involved the use of questionnaires and interviews with key groups:

- 49 current and potential service users responded to questionnaires.
- 35 stakeholders took part in semi structured interviews including Commissioners and key statutory staff, Specific Infrastructure Organisations (SIOs) and Providers. A further eight interviews took place with a range of regional and local agencies.

The four groups identified a great many themes. These are set out in detail in the full report. It is important to review the responses in order to gain a full appreciation of the information we had to construct our models and recommendations. Here we offer but a highly abbreviated account of what was said.

### 2.1 Service users

Despite efforts to provide information on Personalisation to service users, it appears that many remain unclear and uneasy about what to expect. Concerns were expressed as to whether people might be worse off under the new system because of reduced funding and the difficulty of finding personal assistants. Having clear, up-to-date information was identified as a high priority.

### 2.2 Commissioners, SIOs and Providers

All groups were acutely aware of the anxiety among service users and that one way to tackle this was by offering timely and accessible information. There was also an understanding that care needed to be taken so as not to raise expectations unrealistically. Many providers and SIOs were waiting for clearer guidance from the statutory sector before approaching their service users.

There was broad agreement that the voices of service users needed to be listened to and that a particularly focused effort was needed to reach groups such as those in the Black and Minority Ethnic or Gypsy and Traveller communities.

Although everyone was positive about Personalisation, none had as yet a clear picture of what the new world would look like. They were, however, clear that they all faced serious challenges related to transforming their organisations, including such things as culture, workforce development, funding, contractual arrangements, monitoring and evaluation and relationships with service users.

Finally, while some stakeholders had begun to institute changes in order to prepare for Personalisation, all agreed that a model was needed to take the agenda forward in a more deliberate way. There was also a consensus that service users must be at the heart of this model.

### 3.0 DEVELOPING A MODEL

Two models were developed based on evidence from the mapping findings and discussions with stakeholders. It must be stressed that neither model is set in stone, but rather they both offer frameworks for understanding the dynamic relationships needed to make Personalisation a reality, together with suggestions for making that reality operational.

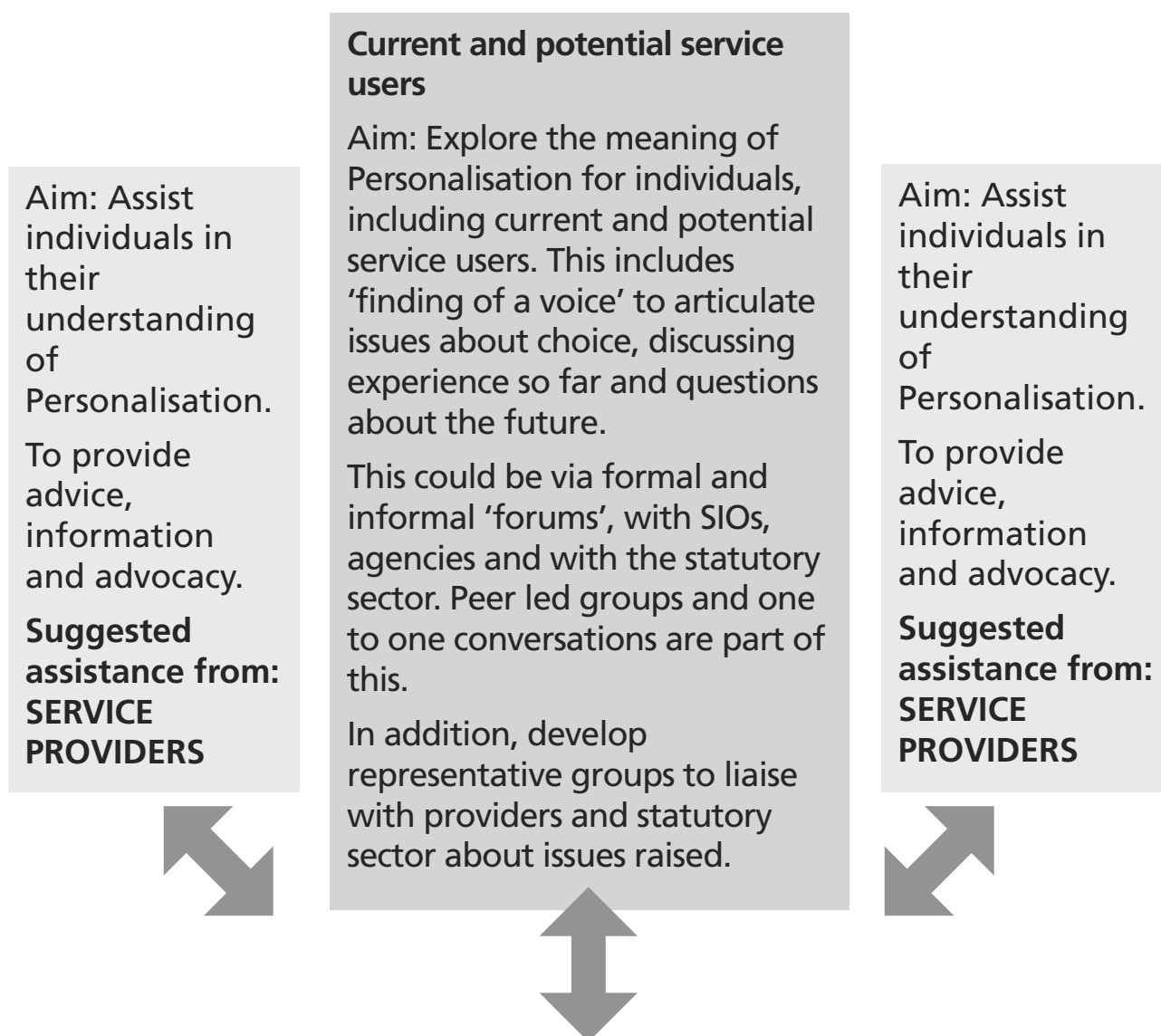
#### Model 1: The ideal – exploration of Personalisation by Service Users

This model acknowledges that ‘ideally’, time should be invested in allowing individuals including current and potential service users the chance to develop an understanding of the concepts behind Personalisation.

#### Model 2: The practical response - Personalisation: aims and key stakeholders

This model acknowledges the reality that Personalisation is moving on apace with service structures already having to respond to changes concurrent to service user understanding developing.

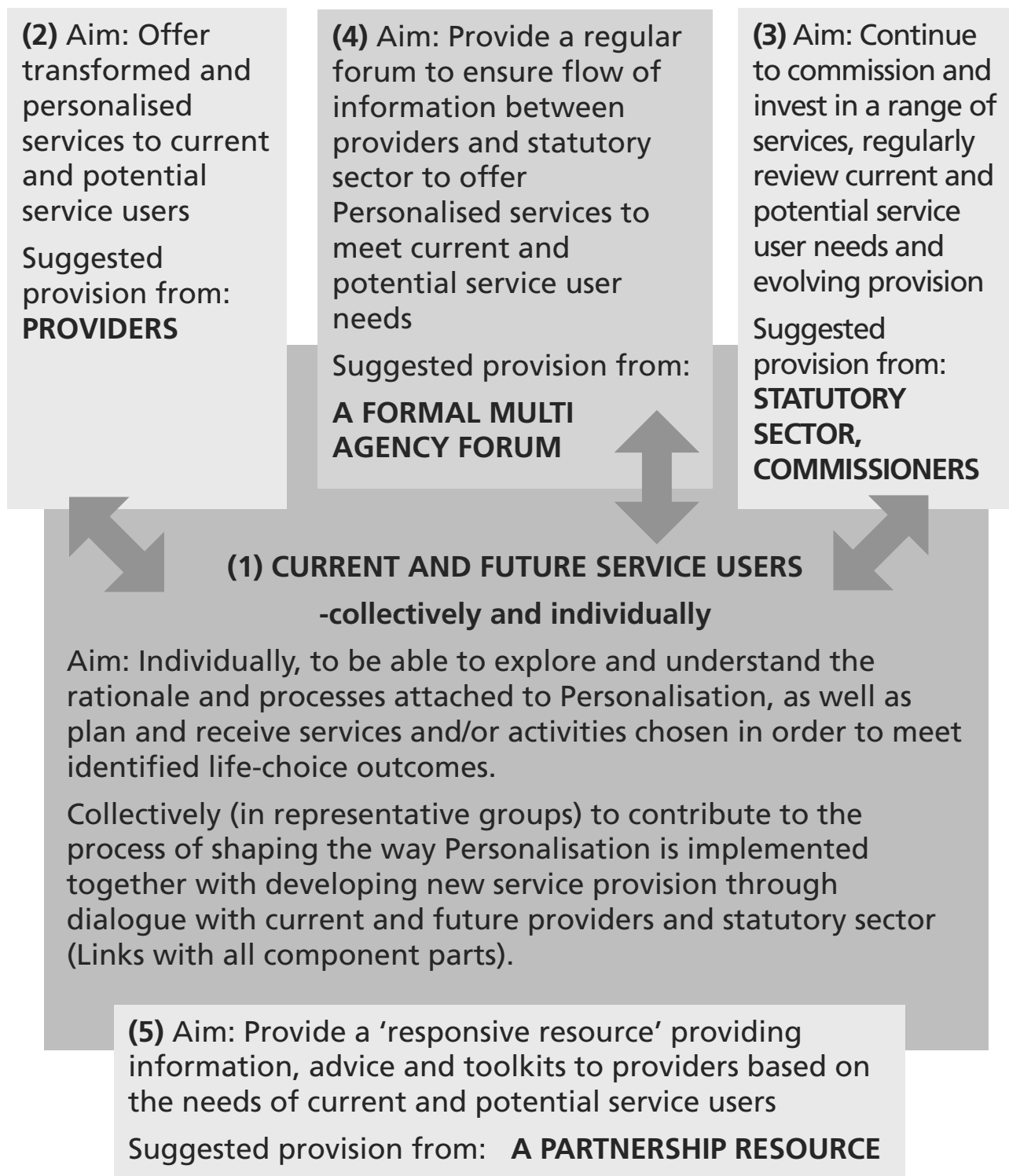
#### Model 1: The ideal - exploration of Personalisation by Service Users



This model then ‘evolves’ to Model 2

Unfortunately, the exploration of equality and choice through Personalisation is compromised by time constraints. Model 2 is therefore 'the practical response' to current reality. It shows key component parts of Personalisation by 'aim' and suggests key stakeholders who could fulfil that aim.

**Model 2: The practical response - Personalisation: aims and key stakeholders**



## 4.0 RECOMMENDATIONS: MAKING THE MODEL REAL

---

In order to provide guidelines to support the implementation of the models, six key steps were identified.

### 1 Clarification of roles

**Reason:** Currently, a number of new Personalisation-specific roles have had funding agreed and will be operational by summer 2009. This includes roles within the statutory sector. It is important that all agencies know what these roles are, and what work will be undertaken within them to avoid any duplication of tasks.

All parties must be accountable to each other if trust and commitment is to be established and maintained. This means that each component part must have transparent methods of working.

**Responsibility:** All stakeholders, including:

**Statutory sector:** Clarify new roles and inform all stakeholders, plus what actions existing staff will cover re Personalisation.

**SIOs:** Clarify roles that could be taken on ensuring there is no duplication between SIOs.

**Providers:** Clarify in-house roles for forwarding Personalisation within agencies.

**Service users:** Form new, and maintain and increase existing service user groups, with the assistance of other stakeholders if and when required.

A formal multi agency forum could assist with this.

### 2 Clarification of priority tasks

**Reason:** The findings of this report and proposed models show the key players necessary for Personalisation to progress in Norfolk. Alongside the need for clarity regarding new roles, it is necessary for all players to be clear about what are priority tasks to undertake.

**Responsibility:** All stakeholders, including:

**Statutory sector:** Draw up priority tasks and milestones where relevant, with indication of links with provider progress.

**SIOs:** Draw up priority tasks and milestones where relevant, with indication of links with provider progress.

**Providers:** Draw up in-house plans for priority tasks as well as link with planning from statutory sector and SIOs where relevant.

**Service users:** Agree what information and discussion is needed first and what individuals/ agencies can help with this.

A formal multi agency forum could usefully indicate prioritised tasks in consultation with all stakeholders; this could then feed into the Partnership Resource.

### 3 Development of service user groups

**Reason:** Current and potential service users are central to Personalisation. In the first model, service users were given time to explore the meaning of equality and choice. The reality is, however, that there is limited time to provide this. Existing and new service user groups are therefore vital if Personalisation is to keep to its key concept of service users being at the centre.

So far, six ongoing forums for disabled people and their families have been set up around the county. Representatives from each group meet as an official advisory body on Personalisation with Norfolk Adult Social Service

Such work is dependent on:

- Service user groups being part of each Provider's service, with overarching groups provided by SIOs eg NCODP.
- Service user groups being available at times and locations to suit a diverse population.
- Service user dialogue and discussion being creative to ensure that as many service users as possible can have a part.
- Effort channelled into increasing service user participation by making groups 'worthwhile'.
- Groups having formal feedback routes to other component parts of the model. A formal multi agency forum may be a useful channel.

**Responsibility:** All stakeholders must ensure that the development and maintenance of service user groups occurs. This includes:

**Statutory sector:** User group comments must reach the statutory sector and be responded to.

**SIOs:** Some SIOs may provide service user group structures for a number of agencies. Feedback to the statutory sector and providers is necessary.

**Providers:** Ensure that service users have formal and informal mechanisms for engaging in discussion via groups, forums and one to one. This includes peer led discussion and facilitated discussion where relevant. Providers should respond to, not dictate, the groups' agendas.

**Service users:** Work with stakeholders to ensure effective forums are available that are arranged for useful times with adequate access arrangements in place.

#### 4 Development of dialogue with potential service users; 'hidden voices'

**Reason:** There is a shared acknowledgement that there are a significant number of individuals who are:

- Eligible for statutory funding for social care, but are not known to the Statutory Sector.
- Not eligible but have needs that might be addressed by current or future Providers.
- Using services currently but will not be eligible for Personal Budgets.

This may be because of issues of diversity including ethnicity, education and area of residence.

To ensure that Personalisation is equitable throughout Norfolk, work needs to be undertaken to engage such groups.

**Responsibility:** All stakeholder groups including:

**Statutory sector:** Strategically plan and undertake work to reach identified 'hidden voices'. This may need particular agencies to be commissioned who have strong links with particular communities.

**SIOs:** Undertake work to reach and engage with 'hidden voices'.

**Providers:** Ensure that users of services who will probably not be eligible for Personal Budgets are given forums for discussion with encouragement to attend.

**Service users:** Where possible, encourage 'hidden voices' known to themselves to be part of fora and individual conversations with statutory sector work, SIOs and providers.

The formal multi agency forum needs to ensure that this work is highlighted. It is also the responsibility of all stakeholders.

#### 5 Development of a Partnership Resource

**Reason:** The mapping exercise reported that many agencies either had not begun tasks associated with Personalisation, for example unit costing. This resource therefore is required to enable a significant number of agencies to move forward.

**Responsibility:** All stakeholders including:

**Statutory sector:** Ensure that relevant staff link with the resource and assist where possible.

**SIOs:** An SIO may be responsible for the resource, otherwise ensure that links are made with action promised where relevant to develop resources as required according to provider and service user need.

**Providers:** A provider may be responsible for the resource, otherwise link with the resource with feedback about resources needed and what

can be contributed.

**Service users:** Ensure that resources are based on service user need.

## 6 Agreement on structures for flow of information

**Reason:** Personalisation involves information on progress passing between various sources from Central Government to the Statutory Sector to Providers and service users.

It is important that effective routes for information flow are identified and formalised and publicised to all relevant parties.

Included in this should be information about LAA indicators and progress towards meeting them. (See Appendix 3 for relevant indicators)

**Responsibility:** All stakeholders including:

**Statutory sector:** Must have robust two way communication routes between themselves and SIOs, providers, service user groups and 'hidden voices' where relevant. Adult Social Services will be responsible for the directory of services as part of their 'front door' work. This must have the ability to be quickly updated and available in a variety of formats.

**SIOs:** Must have robust two way communication routes between themselves, statutory sector, providers, service users and 'hidden voices' where relevant.

**Providers:** Must have robust two way communication routes between themselves, statutory sector, SIOs, service users and 'hidden voices' where relevant.

**Service users:** Must have robust two way communication routes between themselves, statutory sector, SIOs and providers.

## CONCLUSION

---

This report is based on evidence from a wide range of stakeholders in Norfolk. It gives a picture of current understanding and progress, as well as an initial framework for meeting the challenges ahead.

It cannot be emphasised strongly enough however, that Personalisation is a dynamic process, one for which there are no road maps or even 'sat navs' to guide us. Because of this, the models we have outlined will evolve as together we all learn more about the character of the terrain in this new world. Only one thing is certain, the service user is and must remain central to Personalisation. It is the responsibility of all stakeholders to be committed in a practical, and strategic way to ensure that this is so.





