Orkney Health and Care
Health and Community Care
Self Directed Support (SDS) Act Action Plan from May 2013

Actions	Outcomes	Responsibility	Stakeholders	Timescale	Status
What actions are you going to take?	How will you know when it is complete? What are the outcomes you would like it to have?	Who is responsible for ensuring that it happens?	Who is involved/ effected & how?	When will it be done?	Track the progress of the action

Actions	Outcomes	Responsibility	Stakeholders	Timescale	Status
1.0 Design Resource Allocation System (RAS)	**On completion we will have a fully-functional RAS**	**SHW, AFM**	**Directorate**	**October 2013**	
1.1 Design RAS calculation model.	On completion we will have a working resource calculation tool.	SHW & AFM	Directorate	April 2013	
1.2 Prepare random client list in preparation for populating RAS	On completion a randomly-generated list of sample clients will be available to inform the population of the RAS tool	SHW	AFM	May 2013	
1.3 Prepare and validate the Self-Assessment Questionnaire (SAQ)	On completion the SAQ will be validated and signed-off	SHW, AFM & CS	Operational Managers / Senior Practitioners of ASW, AAD & CMHT	July 2013	
1.4 Ensure that service provision costs are translated into hourly/daily rates that are robust and will work with client buy back, for example	This will give indicative rates for services to allow packages to be costed	PR	SHW, AFM, CS	October 2013	

1.5 Price each existing care package within the random client list in order to populate the Percentile Allocation Table	On completion we will have a completed Percentile Allocation Table	AFM, SHW	CS	January 2014	
1.6 Undertake review of the random client list using the Self-Assessment Questionnaire (SAQ) in order to generate a points score, thereby generating an indicative budget (IB)	An IB for each client in the random client list will be completed, thereby allowing validation of the RAS calculation tool and, in consequence, the Individual Budget allocation strategy	AFM	SHW	February 2014	
1.7 Design and implement a RAS review and variance analysis process	The accuracy of the RAS model must be reviewed regularly to ensure that the majority of Indicative Budgets are adequate to meet assessed needs. On completion, the process will be agreed and signed-off	SHW, AFM	Social Workers and Care Manager staff	April 2014	
2.0 Prepare & deliver SDS Seminar for Elected Members (EMs) & OHAC Board Members	**This will educate and inform Elected Members and other decision-takers of the SDS Act, the requirements therein, and how we are addressing the project**				
2.1 Undertake Consultation & Engagement Training	This will enable SHW to complete the Consultation & Engagement Plan	SHW	Learning & Development	July 2013	
2.2 Prepare Consultation & Engagement Document	Document completed	SHW	AFM, CS	August 2013	
2.3 Prepare PowerPoint, FAQs Sheets and Seminar Pack	Presentation, sheet & packs completed and agreed	SWH	AFM, CS	August 2013	
2.4 SHW, AFM & CS to meet to	Seminar content and presentation	SHW	AFM, CS	August 2013	

finalise the content & presentation of the SDS EMs Seminar	prepared and agreed				
3.0 Prepare and deliver a presentation to OHAC Board on the SDS function &, subsequently, the RAS function	**OHAC Board will be able to make an informed decision regarding the continuing development of the SDS function.**	**SHW, AFM, CS**	**OHAC Board Members**	**November 2013**	
3.1 Amend Seminar presentation so that it is suitable for delivery to OHAC Pre-Board Meeting Session	Presentation completed and agreed	SHW	SHW, CS	October 2013	
3.2 Amend presentation (**3.1**) for delivery to main OHAC Board Meeting	Presentation completed and agreed	SHW	SHW, CS	October 2013	

4.0 Convene an SDS Working Group to oversee the development of the SDS project	**SDS Working Group convened**	**AFM, SHW**	**SHW, AFM, Maureen Swannie, Karen Stevenson, Lynda Bradford, Tom McGuire, Pat Robinson, Gail Anderson**	**September 2013**	
4.1 AFM to compose & dispatch invitations to the proposed participants, collate response and arrange 1st SDS Working Group Meeting	SDS Working Group 1st Meeting arranged	AFM	**SHW, AFM, Maureen Swannie, Karen Stevenson, Lynda Bradford, Tom McGuire, Pat Robinson, Gail Anderson**	June 2013	
4.2 Prepare 1st Agenda to plan the programme for the SDS Working Group over the coming months	SDS Working Group 1st Meeting planning completed.	SHW	SHW, AFM, Maureen Swannie, Katherine McKerrell, Karen	August 2013	

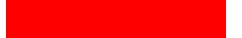|			Stevenson, Lynda Bradford, Tom McGuire, Kenny Low, Pat Robinson, Gail Anderson		
5.0 Undertake a visit to one of the SDS Test Sites	**With several years' experience of SDS delivery, a test site will provide invaluable advice and learning on the delivery of SDS**	**SHW**	**AFM, CS**	**June 2013**	▇
5.1. Identify appropriate Test Site and arrange visit	Visit arranged	SHW		April 2013	▇
5.2 Prepare for and undertake visit (Highland Council identified as the most appropriate authority to visit)	Visit completed	SHW		June 2013	▇
5.3 Compose a report detailing the lessons learned from the visit, and how these will be used in creating the SDS function in Orkney	Report completed and delivered	SHW	AFM, CS	June 2013	▇
6.0 Prepare & submit a response to the Self-Directed Support Guidance & Regulations	**The completed Guidance response is required by government on or before 10th July**	**SHW, AFM**	**CS**	**July 2013**	▇
7.0 Write policy and procedure with flow charts for consultation with all stakeholders	**The draft Self-Directed Support Policy & procedures document will be complete, ready for consultation**	**SHW, AFM**	**SDS Working Group Members**	**December 2013**	▇

7.1 Contact Legal Department and request an Allocated Person to consider and Advise upon all Policy submissions	Appointment of an SDS Allocated Legal Person	AFM	AFM, SRHW, Legal Department	July 2013	
7.2 Prepare SDS Procedure Document, **informed by SDS Draft Guidance**, *(Use the Guidance wording extensively,)* to include a Flowchart	Completed and approved SDS Procedure Document	SRHW	SRHW, AFM	December 2013	
7.3 Prepare SDS draft Policy Document, informed by SDS Guidance, for submission to Board, following the September Seminar & subsequent Presentation to OHAC Board	Completed draft Policy Document	SRHW	SRHW, AFM	December 2013	
7.4 Refer the approved SDS Policy Document to Legal Department, for approval	Completed SDS Policy Document approved by Legal department	SRHW, AFM	SRHW, AFM	February	

8.0 Design and implement IT systems to support the new functions and processes required by SDS, including the facility to hold and distribute Individual Service Funds.	**A fully-functional, tested and validated IT support system(s) will be in use by apposite staff**	**SHW**	**IT & user staff**	**(As long as it takes, plus 1 day!)**	
8.1 Meet Civica and discuss the facilities and scope of development, within Paris, to deliver the SDS IT solution	We will be appraised as to whether Paris can deliver the SDS IT solution	AFM, SHW	CS, IT Dept.	June 2013	
8.2 Meet John Pettigrew & discuss the potential for MS Sharepoint as an SDS / Social Services IT Solution	We will be appraised as to whether Sharepoint can deliver the SDS / Social Services IT Solution	AFM, SHW	CS, IT Dept.	September 2013	

8.3 Consider MS Excel and / or MS Access as an SDS IT solution	We will be appraised as to whether Sharepoint can deliver the SDS / Social Services IT Solution	AFM, SHW	CS, IT Dept.	September 2013	████
8.4 Meet with Children & Families' (C & F) Services and discuss adoption of the chosen SDS IT Solution for delivery of SDS functions	C & F adopt chosen SDS IT solution to ensure seamless delivery of SDS throughout Social Services (hopefully!)	AFM, SHW	CS, Children & Families' Services, IT Dept.	September 2013	████
8.5 Develop chosen SDS IT solution to provide seamless delivery of the SDS function throughout Social Services	SDS It solution tested and delivered	AFM, SHW	CS, Children & Families' Services, IT Dept.	September 2013	████

9.0 Design and implement the SDS Training & Publicity Programme	**All Elected Members, senior management, stakeholder staff and Third Sector organisations will be familiar with the SDS Act and its requirements. Stakeholder staff will be familiar with new operational procedures and associated systems**	**SHW, AFM & CS**	**Elected members, Third-Sector Organisations, Senior Management & OHAC staff**	**April 2014**	████
9.1 Following appointment of the 2 SDS National Training Officers, establish contact and request a visit to Orkney, with a view to exploring the National Training Workforce Programme and how this may be applied in Orkney. Produce Post-Visit Report	SDS Officer(s) visit and Post-Visit Report completed	SHW	AFM, CS, Learning & Development(?)	October 2013	████
9.2 Design and implement a suitable macro-level training session for Third-Sector organisations, with particular	Third-Sector organisations and their staff will be familiar with the SDS Act and the opportunities that this presents for clients	SHW & AFM	Third-Sector Organisations	March 2014	████

emphasis on the client					
9.3 Design and implement a detailed training programme for care staff, encompassing the SDS Act, SAQ, RAS, new IT systems and new procedures	All care staff will be familiar with the every aspect of SDS and the changes that this will require in their daily work	SHW & AFM	OHAC Staff	March 2014	█████
9.4 Undertake a publicity campaign utilising local media, Third-Sector and support groups, in addition to promotion by OHAC staff through "word-of-mouth" and printed materials, to promote the choices and control that SDS offers to clients	Radio Orkney & Orcadian features will be aired / published. Training to facilitate SDS promotion at annual review. Printed promotional leaflets and associated materials will be delivered and displayed appropriately.	SHW, AFM	CS, Public Partnership Forum, Communications (David Hartley)	April 2014	█████

10.0 Design a process and supporting IT for statistical retention and dissemination for Operational Managers, Senior Management, Elected Representatives and central Government	**Processes and detail will be agreed by Directorate**	**SHW, AFM**	**Directorate**	**July 2014**	█████

11.0 The provision of independent advocacy is requisite within the SDS Act. Meet Advocacy Orkney to formalise arrangements for advocacy facilities, addressing existing arrangements and funding, if appropriate	**Formal SDS advocacy procedure agreed and signed-off**	**SHW, CS (Rosemary Colsell?)**	**Advocacy Orkney, Project & Funding Function**	**March 2014**	
12.0 In anticipation of an increase in Direct Payment users, review the function & performance of the Independent Living Project ILP function and extend staffing hours, if appropriate	**On completion, the existing waiting-list for Direct Payments will be resolved, with larger capacity, allowing for an increase of 50% in Direct Payment clients**	**SHW, CS, (Rosemary Colsell?)**	**Independent Living Project, Project & Funding function**	**March 2014**	
12.1 Appraise and price the Highland Council model	On completion, a brief report will be produced recommending / dismissing this approach	SHW	AFM, CS	October 2013	
12.2 Appraise and price in-house delivery of the ILP function	On completion, a brief report will be produced recommending / dismissing this approach	SHW	AFM, CS	October 2013	
12.3 Appraise and price the practicality and efficacy of a service provided by Orkney Business Ring	On completion, a brief report will be produced recommending / dismissing this approach	SHW	AFM, CS	October 2013	
13.0 Consider future staffing requirements for the SDS function	**Recommendations for staffing delivered to Directorate**	**SHW, AFM**	**Directorate**	**July 2014**	

14.0 Consider how we will measure the performance of the new SDS regime.	**A strategy for monitoring the efficacy of the SDS regime will be delivered to Directorate**	**SHW, AFM**	**Directorate**	**July 2014**	████████
15.0 Publish Eligibility Criteria, in accordance with the requirement to do so included with the SDS Guidance		**AFM, SHW**	**Directorate**	**March 2014**	████████