

To: SOCIAL WORK COMMITTEE	Subject: EQUIPPED FOR INCLUSION, REPORT OF THE STRATEGY FORUM: EQUIPMENT AND ADAPTATIONS	
From: DIRECTOR OF SOCIAL WORK		
Date: 30 th OCTOBER 2003	Ref: DW	

1. PURPOSE OF REPORT / INTRODUCTION

- 1.1. To advise Committee of the Scottish Executive draft strategy entitled Equipped for Inclusion, Report of the Strategy Forum: Equipment and Adaptations, the response submitted to the Scottish Executive (Appendix 1).

2. BACKGROUND

- 2.1 The production of the report follows on from the 'Community Care: A Joint Future' report issued in November 2000, which recognised the need for direction in Equipment and Adaptations services.
- 2.2 The draft strategy sets out recommendations for the future, and represents advice to the Scottish Executive. Prior to Ministers considering their response to the report, views of all interested stakeholders were sought during a public consultation period which ended on 26th September 2003.

3. PROPOSALS / CONSIDERATIONS

- 3.1 The report provides a strategic vision for equipment and adaptations which is broader than service provision. It also considers issues of equality in relation to disability, illness and getting older. Four key areas are identified:
- Promoting equipment and adaptations as part of every day life - the promotion of social justice through the mainstreaming of equipment and adaptations.
 - Extending and sharing knowledge by improving the information available and improving how information is provided - supported by advice and demonstration.
 - A Joint Future - equipment and adaptations integrated with one another and within community care services. Approaches which cross care groups through joint resourcing, joint service management, single shared assessment and care management.
 - Assuring quality and innovation - by auditing and improving service standards, improving our knowledge base, evidencing and evaluating the impact on people's lives and the impact on other care services, and by encouraging and supporting innovation.
- 3.2 Thirty-five recommendations are made by the Strategy Forum. The first is to establish an Implementation Steering Group: Equipment and Adaptations, which will effectively implement the strategy while influencing, leading and sustaining change.

3.3 Through a tasked agenda, the Implementation Steering Group will address the remaining recommendations to include:

- Commissioning a comprehensive audit of education and training for people working in Equipment and Adaptations services.
- Undertaking a review of Single Shared Assessment, with specific reference to Equipment and Adaptations provision.
- Commissioning a Scotland-wide audit of information networks.
- Providing guidance on minimum standards for services.
- Identifying current annual expenditure and the cost-effectiveness of providing Equipment and Adaptations.
- Promoting a Scottish Centre of Excellence and Development for Equipment and Adaptations to support innovation, development, universal design and accessible products.
- Encouraging all sectors to provide universal housing and space standards which incorporate new technologies.
- Promoting the inclusion in Equipment and Adaptations Services of older people in care homes and children through transition into adulthood, as well as incorporating links with education and employment.

3.4 North Lanarkshire Council in partnership with Health has already achieved some of the recommendations. These include:

- The establishment of the Joint Equipment Service with a joint Social Work / Health management structure. Affiliated to this are, SAIL (Support and Advice for Independent Living) and the mobile unit which provide accessible information and facilities for demonstrating equipment and adaptations.
- The introduction of Single Shared Assessment for older people includes the provision of non-complex equipment and adaptations following a core assessment. This allows access of this equipment by other professionals.
- The recent introduction of SMART technology products promotes innovation.
- Within the Local Authority Housing sector all new build properties funded through Communities Scotland are built to Housing for Varying Needs guidance.
- Following consultation with stakeholders, a draft Housing Strategy for North Lanarkshire has been developed, incorporating the specific needs of people with disabilities.

3.5 North Lanarkshire is progressing Equipment and Adaptation services in line with the recommendations in the draft strategy. Further developments are planned in relation to:

- A self assessment format for non complex equipment.
- The potential for pooled budgets as opposed to the currently aligned budgets for the Joint Equipment Service.

- The availability of information about services in a variety of formats e.g. video (British Sign Language).
- The development of qualitative information about outcomes of people using services.
- The continuing development of service standards.

3.6 North Lanarkshire Council's current Best Value Review of Independent Living Services will continue to address the recommendations in the draft strategy, which is sympathetic to the approach thus far adopted by North Lanarkshire Council.

4. FINANCIAL / PERSONNEL / LEGAL / POLICY IMPLICATIONS

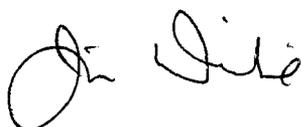
4.1 The draft strategy was produced alongside its partner document 'Using the Law to Develop and Improve Equipment and Adaptation Provision' which was commissioned by the Scottish Executive to inform the work of the Strategy Forum. It provides an overview of the legal position in Scotland relating to Equipment and Adaptations.

4.2 At this time there are no legal or financial implications for North Lanarkshire Council. However Committee will be advised as detailed proposals concerning the implementation become known.

5. RECOMMENDATIONS

5.1 Committee is asked to:

- (i) approve the North Lanarkshire response to the draft strategy
- (ii) note the contents of the report



Jim Dickie
Director of Social Work
19th September 2003

For further information on this report please contact Mary Wilson, Service Manager, Community Care (Adult Services) (TEL: 01698 332065) or Dilini Wilkinson, Senior Officer (TEL : 01698 - 332171)

Department of Social Work
Scott House
Merry Street
Motherwell ML1 1JE



Contact: Jim Dickie
Our Ref: JD/ST/LMcG
Your Ref:
Date: 6 October 2003

Telephone: 01698 - 332027
E-mail: DickieJ@northlan.gov.uk
Fax: 01698-332054
Web Site: www.northlan.gov.uk

Director of Social Work
Jim Dickie

Susan Buckle
Chair of Strategy Forum
Room 3ER
St Andrews House
Regent Road
Edinburgh
EH1 3DG

**COPY FOR YOUR
INFORMATION**

Dear ~~Ms~~ ^{Susan} Buckle

**Re Response to the Report of the Strategy Forum on
Equipment and Adaptations : Equipped for Inclusion**

Thank you for forwarding a copy of the above noted document, which has generated considerable discussion amongst staff involved in independent living services in North Lanarkshire. It was also helpful to receive an extension to the original deadline due to the absence of key staff involved in this area of activity.

North Lanarkshire Council welcomes the development of a clear strategic direction for the development and provision of equipment and adaptation services in Scotland. This continues to be an area of significant interest requiring both generic and specialist knowledge and skills. It is also an area of potential development through the use of technology. This is, of course, a major challenge in meeting need / demand and this continues to be a significant issue for local authorities.

Please find attached some specific comments about the document which I trust you will find helpful. If you require any additional details, please contact Susan Taylor, Manager (Adults), Tel 01698 332177 or email TaylorSu@northlan.gov.uk.

Yours sincerely

A handwritten signature in cursive script that reads "Jim Dickie".

Jim Dickie
Director of Social Work

North Lanarkshire Council

Response to 'Equipped for Inclusion, Report of the Strategy Forum: Equipment and Adaptations.'

October 2003

The following comments reflect the response of North Lanarkshire Council Social Work and Housing Departments. This has been developed in consultation with NHS Lanarkshire, which has already forwarded a separate response to the document.

1. Comments on the strategic direction

- 1.1. The report appropriately challenges the limited perceptions which exist about equipment and adaptations, and encourages a more inclusive and innovative way of thinking about our approach to the provision of such services. This type of approach is in fitting with the values and approaches adopted by North Lanarkshire Council in developing and implementing person centred services, which also seek to promote opportunities. This national direction is welcomed, and it is hoped that this will assist to address some of the inconsistencies and fragmentation which has occurred over the years due to differences in the local interpretation of legislation and policy guidance.
- 1.2. The companion document "Using the Law" provides a helpful overview of the legislation and guidance in this area of activity. As outlined above, it will be necessary to develop this work further by revisiting the guidance about roles and responsibilities, with particular regard to the current shift towards more integrated working between agencies.
- 1.3. Four key areas are identified for strategic development. The recommendations within these areas remain broad, and require further research and development. It will be important to develop very specific action points to ensure that work is taken forward. As recommendations become more detailed they should scope out the potential impact on resources, such as staffing, budgets, training, etc.
- 1.4. North Lanarkshire Council in partnership with NHS Lanarkshire have already achieved some of the recommendations, including the development of the Joint Equipment Service. A Best Value Review of Independent Living Services is currently being concluded, which will also influence the future shape of equipment and adaptations provision in North Lanarkshire. We would be pleased to be involved in the further development of this work.

2. Comments on recommendations:

Recommendation 1: to influence, lead and sustain change, encourage innovation and support implementation of the strategy through a tasked agenda, the Scottish Executive should establish a national forum, the 'Implementation Steering Group: Equipment and Adaptations

A tasked Implementation Steering Group would be welcomed to sustain the inevitable changes that will follow and to continue to give a national focus and direction to the implementation arrangements. It would be helpful if the group could take a lead role in sharing information, advising and encouraging local innovation, while being sensitive to the importance of local decision making. This Council would be keen to ensure that the approach of such a Steering Group is consistent and integrated with other relevant work taking place at a national level, particularly within the Joint Future agenda.

Recommendation 2: to ensure that equality underpins all training, the Scottish Executive should commission an audit of education and training providers delivering 'pre' and 'post' qualifying courses for people involved in equipment and adaptation services.

This recommendation is supported and would be helpful in shaping future staff development arrangements relating to assessment and the provision of equipment and adaptations. The audit should take into consideration the differing levels of knowledge and skills required for staff working in this area. Given that a range of staff involved in the provision of equipment and adaptations are not professionally qualified, the development of a competency framework should be considered.

Recommendation 3: the Scottish Executive should actively promote, through commissioned research and publishing further guidance as required, Direct Payments for people who want to use them to organise equipment and adaptations.

This recommendation is supported. North Lanarkshire have incorporated equipment and adaptations within their policies and procedures for Direct Payments but further guidance on this area is welcome.

Recommendations 4 and 18:

4: all services offering equipment and adaptation information, advice, demonstration, assessment and provision should actively promote risk taking as a reasonable component of daily life.

18: local partners should promote self assessment and assessment by a wider range of assessors, for 'simple' equipment and adaptations. A national perspective should be encouraged through the 'Joint Future Equipment and Adaptation Network' where examples of promising practice can be shared and any concerns addressed.

Both recommendations are supported. North Lanarkshire Council is in the process of developing a self assessment service for equipment which addresses the needs of people with defined support requirements. Careful consideration has been given to risk issues, and advice and support has been given to individuals who wish to access equipment in this way.

Recommendation 5, 6, 7, 8 and 33:

5: to promote mainstreaming, the Scottish Executive should commission a base line appraisal of the availability of equipment and adaptation in conventional commercial enterprise, against which the measurement of change can be established. The Implementation Steering Group would work with designers, manufacturers, retailers and people who use equipment and adaptations to replace disabled and older stereotypes with a view of consumers coming from a broad spectrum of physical capabilities, irrespective of age and medical condition.

6: the Scottish Executive should encourage industry to expand the range of products that are available 'off the shelf', and to incorporate features that make everyday items easier for everybody to use. The International Year of Disabled People in 2003 should be used to 'kick start' this.

7: the Scottish Executive should encourage all sectors to place greater emphasis on universal housing. This should include amendment of the building regulations to increase the space standards for occupiers, and the introduction of an accessibility (or universal design) standard across all sectors.

8: the Implementation Steering Group should consider how best to capture the potential of technology, to create an integrated portfolio of products and services. It should also consider how to ensure that all sectors include the basic physical requirements, and the cabling and wiring capacity, for the flexible use of SMART technology in all new build property and conversions.

33: the Scottish Executive should establish a 'Scottish Centre of Excellence and Development for Equipment and Adaptations', to support innovation and development and provide a national service focus.

The above recommendations are fully supported. There is much innovation at both a national and international level which could inform the development of practice across Scotland. Flexibility in design and universal design should be incorporated not only in housing provision but in all areas of technology. There should also be more emphasis on the concept of universal design in the education of other professions involved in design such as Architects, Product Designers etc. A National Centre of Excellence would be welcome to co-ordinate all of the above and provide a sustained focus in this area. It would be important for any such development to be informed by local practice, and to develop a strong network of lead champions in local areas.

Recommendation 9 and 10:

9: all services should ensure the inclusion of disabled and older people in the development of policies, priorities and objectives, relating to the delivery of equipment and adaptations.

10: to establish a lifelong approach to the implementation and development of this strategy, those responsible for implementing the agenda for children, together with partners across education, lifelong learning and employment should work with the Implementation Steering Group. A sub-group of the Implementation Steering Group should be formed to review equipment provision in care homes as a priority, and the Scottish Executive should commission an addition to the design guide series 'Housing for Varying Needs' for Care Homes.

Recommendations 9 and 10 are fully supported. North Lanarkshire Council has a very strong commitment to the involvement and participation of local people in all aspects of service planning, design, implementation and delivery. There are several strong user/carer organisations which will have an interest in this area of development, due to their participation in the development of the Joint equipment Service in North Lanarkshire, which is provided in partnership with NHS Lanarkshire.

Recommendations 11 – 14:

11: the Scottish executive should ensure that the work of the Scottish Borders e-Care project is developed, in partnership with the Implementation Steering Group, to create the comprehensive information resource described, including mechanisms to maintain and develop the content.

12: once the comprehensive information resource is available a range of publicity and marketing initiatives should be put in place to increase access to this information for all. This should be underpinned by a robust system to deal with resulting enquiries.

13: the Scottish Executive should commission an audit of local information networks and how they link together, to identify any areas in need of support. They should also commission work on minimum standards for equipment and adaptation information provision, making use of existing mechanisms wherever possible.

14: the Scottish Executive should commission the Disabled Living Centres Council to audit the organisation and delivery of advice and demonstration services for equipment and adaptations across Scotland, to DLCC standards, and support local partners in the development of services that can reach the population of Scotland.

Recommendations 11-14 are fully supported and encouraged. North Lanarkshire have established as part of their overall Joint Equipment Service, the SAIL service (Support and Advice for Independent Living) as a source of information and advice for matters relating to disability and with a wide range of equipment for

demonstration. Affiliated to SAIL is a mobile unit which takes the service to all areas of North Lanarkshire. This has proved to be very successful, and further work is planned to develop various formats in which information can be made more widely accessible. Sharing examples of good or innovative practice from other areas would assist in developing local information networks.

Recommendations 15, 16 and 17:

15: local partners should ensure that equipment and adaptations are integrated fully with one another, and as integral components in the planning and delivery of community care. The Scottish Executive should assist in establishing a 'Joint Future Equipment and Adaptation Network' to share promising practice, to address any difficulties that may arise and to work with the Implementation Steering Group to ensure the expectations of the agenda for equipment and adaptation services are being realised. Particular attention should be paid to any potential barriers to the effective pooling of resources.

16: the Scottish Executive should evaluate progress to date on the sharing of storage premises, and advise the Implementation Steering Group on the benefits achieved and any issues raised. They should also commission a feasibility study on the concept of the e-Care project in the Scottish Borders and other alternative approaches that would deliver the same outcomes.

17: Local Partnership Agreements should be developed to include specific information on the joint resourcing and joint management of equipment and adaptations services.

As outlined, North Lanarkshire Council in partnership with Service Users, Carers and NHS Lanarkshire have established a Joint Equipment Service. It would be helpful to be part of a wider network to share information and good practice. The concept of a Scotland wide store (virtual or otherwise) is interesting, but the value of such a development would require further consideration.

Recommendations 19 –25:

19: the Scottish Executive should review the 'triggers' and indicators for professional expertise in specific areas of equipment and adaptations included within arrangements for single Shared Assessment across Scotland, and work with the Implementation Steering Group to address any anomalies. This expertise should be made available to advice and demonstration services for people who wish to make their own purchases.

20: the Implementation Steering Group should commission a review of the training and resources available to assessors to assist them in the selection of equipment and adaptations, within a framework of finite resources.

21: the Implementation Steering Group should commission an audit of expertise in equipment and adaptation services, to inform an accreditation framework that ensures the competencies and expertise required in the assessment process

leading to the provision of equipment and adaptations are clearly identified, agreed, and monitored.

22: the Implementation Steering Group should commission a review of existing Single Shared Assessment tools to advise on a sub-set of information, and available software packages, to support assessment for and selection of equipment and adaptations, including self assessment.

23: local partners should ensure that care management is considered where individual circumstances suggest that a significant package of equipment and adaptations (and/or a change of accommodation) may be necessary to achieve an acceptable relationship between the person, their environment and their care needs.

24: the Scottish Executive should ensure that in determining the 'joint envelope' and developing Single Shared Assessment, local partners review the processes and procedures involved and challenge why they are there.

25: the Joint Performance Information and Assessment Framework should be developed to capture the effects of the integration of services on equipment and adaptation provision, and its contribution as a component of community care services.

Recommendations 19-25 are supported. In North Lanarkshire, Single Shared assessment is now into its second year. A Health and Care Partnership and Local Care Partnerships have been established to drive forward the change agenda and tackle local issues.

The competencies and expertise required by staff in the assessment of need leading to the provision of equipment and adaptations has been addressed via the training provided to staff. At present there is basic quantitative performance information collated with regard to equipment and adaptations provision through Single Shared Assessment arrangements. Work is already taking place at a local level to improve both the qualitative and quantitative information obtained and recorded throughout the single shared assessment process. Any further work in this area requires to take place in the context of the joint performance information framework.

Recommendations 26 to 28 and 35:

26: the Scottish Executive should commission work to identify the current annual expenditure on equipment and adaptations across all sectors, itemised to compare the cost of providing equipment and adaptations and the cost of the equipment and adaptations themselves.

28: the Implementation Steering Group should commission work to explore approaches to the allocation of resources for equipment and adaptations. Specific attention should be paid to those that capture the dynamic relationship between equipment and adaptations, rehabilitation and care.

35: the Scottish Executive should commission a review of the evidence available on the effectiveness of equipment and adaptations, the impact they have on people's lives, and the relative impact of equipment and adaptations in terms of costs and effectiveness in relation to other health and care services. This should inform the commissioning of subsequent work to fill any gaps.

It would be highly beneficial to receive information from the Implementation Steering group about the cost effectiveness of an equipment and adaptations service nationally. The impact of the service on peoples lives and to other health and care services is an area of research and data that is lacking, though would be crucial in developing quality services. The Audit Scotland report may provide some of this evidence, however qualitative data measuring outcomes as opposed to outputs may be difficult to obtain. It may be helpful to draw on studies or information outwith the U.K.

Recommendations 29 – 31:

29: the Implementation Steering Group should advise on minimum waiting times to be achieved across the equipment and adaptation spectrum.

30: the Implementation Steering Group should set targets for the recycling of equipment and adaptations [including those to capture the impact of registers of special and adapted properties].

31: The Implementation Steering Group should review the way in which equipment and adaptation services [statutory and commercial] are currently regulated to see if and how essential 'care components' are captured, and consider the action required to address any gaps. All local partners involved in the provision of equipment and adaptation services should ensure that requirements for routine maintenance and repair are met, and that systems are in place for any unforeseen events, including emergencies.

Information from the Implementation Steering Group on service standards would be welcomed, if set within a clear and agreed definitions framework. It would however be concerning if strict national standards were set as this would not allow for local variations, and would require a significant investment of resources within local authorities.

Recommendation 34:

34: the Rehabilitation Technology Services Advisory Group and relevant partners should consider the applications of the equipment and adaptation strategy for orthotic and prosthetic services, outlining the benefits of this approach.

It would seem appropriate that the Rehabilitation Technology Services Advisory Group should advise on the matter. The need to consider the very specialist equipment provided to people with sensory impairment also merits some very specific research.

3. Priorities for action:

3.1. The recommendations contained within the report are broadly supported and impact on each other. It is therefore difficult to prioritise areas of most importance. The recommendations tend to be broad and require further detailed information through audit, commissioning and research which will form baseline information from which future service developments can be progressed. The recommendations when further developed should take into consideration the implications on budget, resources, staffing, etc and should be set within realistic timescales for implementation at local level.

3.2. The establishment of an Implementation Steering Group to take the agenda forward, gather baseline information and sustain development should be the first step for action. As indicated, this should take place within the framework of joint future arrangements.

3.3. Priorities relevant to North Lanarkshire Council would be:

- evaluating the effectiveness of the service for service users (outcomes)
- developing clear roles and responsibilities/protocols between agencies for the provision of equipment and adaptations agencies
- evaluating the single shared assessment process and defining competencies for assessment for all staff involved with assessment of equipment and adaptations.

This does not detract from the importance of all other recommendations mentioned.