

Appendix 1 - Personalisation and Direct Payments Strategy Delivery Plan – Update January 2024

Below is an update of the high-level delivery plan of the Personalisation and Direct Payments Strategy.

Theme	Milestone/action	By when	Lead	Update	Status
Workstream 1 (Policy)	Co-produce Personalisation and Direct Payments Strategy outlining Sheffield’s commitments to increase, and further develop, approaches and practices around personalisation.	December 2022	Mary Gardner, Andy Buxton	Strategy co-produced with people with lived experience and stakeholders, approved at AHSC Policy Committee on 19/12/2022. Strategy was formally launched at an event in May 2023.	Complete
	Co-produce Personalisation Policy to include flexibility, autonomy, and creative use of personal budgets to meet eligible needs and outcomes.	June 2024	Mary Gardner, Andy Buxton	Programme planned for 2024	To be launched in 2024
	Develop a practice model that ensures the offer of how to receive personal budget is upfront and leads support planning	June 2024	Mary Gardner / Chief Social Work Officer	Programme planned for 2024	To be launched in 2024
	Develop an approach to topping up Direct Payments and implement revised guidance for social care.	December 2022	Mary Gardner, Shamim Akhtar	Top-Ups on Direct Payments and Reasonable Preference Guidance develop and approved by DP Steering Group and Policy & Procedures Group in December 2022.	Complete
Workstream 2 (Process)	Define and review end-to-end journey process models providing clarity, and consistency, in delivering, and providing, personalised approaches. This will include processes for set-up, support and payments, personal contributions and, process interfaces with children’s and health services.	January 2023	Mary Gardner/ Kat Dyson-Baggaley/ Ghamdan Mohamed	End-to-end journey process models have been created reflecting updated practice for: Direct Payment Set-up, Data Barring Service Checks, Joint packages of care, Social care funded to fully health funded, Support and Payments, Payment queries, Children and young people, Children and young people and health funding Personal Contributions for Direct Payments, Personal Health Budget Recharge processes.	Complete
	Update or create guidance to support workers understand their duties and responsibilities	December 2024	Mary Gardner/ Shamim Akhtar	Employing Family members living in the same household guidance created. Supporting People to Manage their Personal Contribution guidance in place. Direct Payments and Hospital stays guidance created. Direct Payment procedure updated.	In progress – on track
	Embed new practice around Direct Payments and Personalisation.	December 2027	Mary Gardner/ Shamim Akhtar	Programme planned for 2024	To be launched in 2024
	Improve data integrity and the quality of information for Direct Payments and Personal Budgets.	June 2024	Mary Gardner/ Aimee Kaye	Programme underway to ensure consistency in data reporting available between adults and Childrens Direct Payments. Direct Payments data now available in dedicated dashboard.	In progress – on track
	Improve and embed support planning techniques that leads to better options of strengths-based, person-centred, flexible support.	March 2028	Mary Gardner/ Chief Social Work Officer	Programme planned for 2024	To be launched in 2024
	Exploration, development and embedding of mechanisms for calculating fair and equitable personal budgets.	March 2028	Mary Gardner/Finance/ Chief Social Work Officer	Programme planned for 2024	To be launched in 2024
	Existing process and recording systems for auditing Direct Payments to be reviewed and amended to align with service improvements.	April 2024	Paul Edwards	Workshops to co-produce review and update the Direct Payments audit and monitoring process is now underway.	To be launched in 2024
	New monitoring and/or auditing processes developed and established to facilitate new approaches including Individual Service Funds (ISFs).	June 2024	Paul Edwards/Andy Buxton	Work planned for 2024	To be launched in 2024
	Develop new protocols for joint working to facilitate an effective communication system and working relationship between commissioning, social care, and providers.	February 2023	Paul Edwards	Joint working now embedded. Regular updates and learning sessions about Direct Payments shared with social care teams.	Complete
	Review the Direct Payment audit process. Coproduce new ways of working that ensure its easy to follow, least restrictive, GDPR compliant and minimises bureaucracy.	August 2024	Paul Edwards	Name change from ‘audit’ to ‘monitoring’ based on customer survey. New 3-month check-in call with new Direct Payment recipients. New ‘monitoring complete’ acknowledgement letter in place.	In progress – on track
Workstream 3 (Money Management)	Progress the revised Money Management Quality Assurance to business as usual.	December 2023	Andy Buxton	Quality assurance framework refreshed for Money Management Recognised Provider List (RPL). All providers undertaken quality assurance visit and have implemented action plans where appropriate.	Complete – now business as usual

	Create a range of options for people to manage their personal budget.	December 2024	Andy Buxton	Discussions taking place with local credit unions to offer a new option for people to support them to manage their personal budgets.	In progress – on track
	Ensure people have access to clear and correct information about options for managing their money to make informed choices.	June 2024	Lauren Beever/ Andy Buxton	New information and guidance available for people on the Council website and on Sheffield Directory about the different options and support available to manage their personal budgets. Working with money management companies to develop a brochure about their services to help people to make an informed choice.	In progress – on track
Workstream 4 (Direct Payment Support)	Establish and implement a robust and responsive internal support offer including social work expertise, Direct Payments advice and financial monitoring and support.	April 2023	Mary Gardner	Interim Direct Payment Support Service developed and established, which went out to competitive tender process.	Complete
	Review, update, and publish a suite of factsheets about Direct Payments which have been co-designed with people with lived experience and colleagues.	December 2023	Mary Gardner/ Kat Dyson-Baggaley	Factsheet for 'Support to manage your Direct Payment' reviewed and updated. Factsheets developed and published for: Getting a DBS Check for your PA, Employers Liability Insurance, Preventing Infection, Washing your hands, Keeping safe, Thinking of employing a friend or relative as a PA, Arranging support from a provider or agency, Financial Monitoring – what we need to see Buying & Owning Equipment Factsheets available to download from the Direct Payments page on Council website.	Complete
	Work with people with lived experience and colleagues to identify and develop further factsheets as required as new personalised approaches are introduced.	December 2025	Mary Gardner/ Kat Dyson-Baggaley	Guidance on sleep-in rates - under development. Guidance for taking PAs on holiday – under development. Medication management guide – due to start February 2024	In progress – on track
	Design and deliver introduction to Direct Payments training and learning resources for social care staff to support practice development.	March 2023	Shamim Akhtar	Refresher and training and full Direct Payments training programme has been rolled out - 12 training sessions have been delivered, attended by 107 social care workers. Training video to support workers to process Direct Payment on the system has been published. Quarterly Direct Payment lunchtime learning sessions delivered.	Complete – now business as usual
	Design and deliver identified training and learning resources for social workers to support practice development around new and developing personalised approaches.	December 2025	Shamim Akhtar/ Mary Gardner/ Practice Development team	Programme planned for 2024	To be launched in 2024
	Successful mobilisation of interim, commissioned Direct Payment Support Service.	January 2023	Andy Buxton	Contracted awarded to Penderels Trust, service went live in September 2022.	Complete
	Evaluate of Year 1 of 2-year interim Direct Payment Support Service.	January 2024	Andy Buxton	Evaluation underway to inform areas of development for Year 2 of interim service.	In progress – on track
	Complete an options appraisal of potential options for the long-term support service offer.	December 2023	Andy Buxton	Options appraisal undertaken	Complete
	Proposed future option for support service approved.	January 2024	Andy Buxton	Preferred option presented to Policy Committee January 2024.	In progress – on track
	Development and co-design of future support service.	March 2024	Andy Buxton	Programme planned for 2024	To be launched in 2024
	Procurement of future, long-term Direct Payment support offer.	July 2024	Andy Buxton	Programme planned for 2024	To be launched in 2024
	Mobilisation of future, long-term Direct Payment support offer.	August 2024	Andy Buxton	Programme planned for 2024	To be launched in 2024
Workstream 5 (Market Shaping)	Develop an understanding of the current market for Direct Payments, and work with people with lived experience, to identify gaps and priority areas to inform the shaping of a diverse and responsive market.	December 2022	Andy Buxton/ Kat Dyson-Baggaley	Engagement work with providers undertaken to build information about the current market including service offers and fees. DP Market Forum established with people with lived experience to support the development of a provider forum and market shaping work.	Complete – now business as usual
	Develop and invest in the Personal Assistant (PA) workforce.	March 2025	Mary Gardner/ Andy Buxton	Development and launch of Sheffield PA Register which has been co-produced. Incentives/benefits for PAs, including Company Shop membership for PAs established. Sheffield organised and hosted the Yorkshire & Humber PA Workforce Summit in December 2023.	In progress – on track

				Training Directory for Personal Assistants created. Promote and market the role of Personal Assistant to continue by working regionally and lobbying nationally	
	Develop and shape a diverse, responsive, and creative marketplace for people purchasing their own support.	December 2025	Andy Buxton/ Kat Dyson-Baggaley	Programme planned to begin 2024 including launch of DP Provider Forum	To be launched in 2024
	Ensure people have access to clear and correct information about the Direct Payment market meaning people are aware of what options are available and have real choice.	December 2025	Andy Buxton/ Kat Dyson-Baggaley	Programme planned for 2024	To be launched in 2024
	Pilot and develop an Individual Service Funds (ISFs) offer in Sheffield.	April 2024	Andy Buxton/ Mary Gardner	Development underway for ISFs starting with small pilot in supported living services. Small group of interested providers and social care workers established to support development of processes and procedures. Pilot planned to go live early 2024 to test out ISFs for a small number of individuals.	In progress – on track
	Building upon the pilot, expand and further develop the ISF offer for wider roll-out, ensuring ISFs are a viable and sustainable option in Sheffield.	December 2027	Andy Buxton/ Mary Gardner	Programme planned for 2024	To be launched in 2024
	Create a range of options to enable people to have assurance of the quality and appropriateness of market offers.	December 2024	Andy Buxton/ Lauren Beaver	Programme planned for 2024	To be launched in 2024
	Explore and develop options for tech-enabled care and assistive technology that can be accessed via a Direct Payment.	December 2024	Andy Buxton/ Paul Higginbottom	Programme planned for 2024	To be launched in 2024
	Work with people with lived experience and the market to co-produce the future market approach for personalised support.	December 2027	Andy Buxton	Programme planned for 2024	To be launched in 2024
Workstream 6 (DP Review)	Undertake reviews for people whose support has been particularly impacted by Covid-19.	March 2023	Julie Marshall	Supported people to update their support arrangements post pandemic. Created savings of circa £686k.	Complete
	Undertake reviews of people whose support is unclear since the migration to Liquid Logic.	July 2023	Julie Marshall	Reviews completed.	Complete
	Undertake reviews for people who may prefer or require alternative options to Direct Payments.	December 2024	Julie Marshall	Team undertaken creative support planning training. Devised support arrangements via Direct Payments for a group of adults to pool their budgets and generate greater personal outcomes.	In progress – on track

This page is intentionally left blank