

## **1 Introduction**

- 1.1 This report provides information about the HEART shared service Partnership. The Partnership was set up to improve the delivery of mandatory grants provided by Borough and District Councils to provide for adaptations for private householders (Disabled Facilities Grants). The system awards grants to tenants of Housing Associations. The service provides assessment recommendations for Local Authority tenants with an expectation that the landlord Council fund and deliver the adaptation. The aim of HEART is to deliver holistic home assessments and interventions to enable applicants to remain independent at home.
- 1.2 The shared service Partnership has been in place for 5 years and is subject to a legal contract which reflects the arrangements agreed by the six Councils in Warwickshire. It has one host – Nuneaton and Bedworth Borough Council. The service is delivered by two teams – one in the north and one in the south – with the host providing a single line managed staff structure. The HEART Management Board oversees the partnership arrangements and has representation from all 6 authorities involved.
- 1.3 The contract required an oversight review two years into the Partnership. Although the review report and the initial action plan were presented in February 2020 progress was interrupted by the necessity on partners to address and work within COVID-19 safety requirements. The requirements had an impact on the capacity of the HEART Board and service delivery.
- 1.4 Whilst the constraints were unavoidable progress was made against the action plan. More recently the Board has engaged Foundations, the national body for home improvement agencies for England, in advisory capacity to help it to review the focus and objectives for the Partnership so that it can continue to build a successful service for residents. This relationship is ongoing as the Board refreshes the strategic objectives for HEART and starts to understand the implications of the 2021 White Paper for Social Care. Foundations will support the Board to deliver the key tasks required to provide a sound basis for HEART as the Partnership looks to recommend the development of integrated arrangements from April 2023.
- 1.5 This report sets out the key tasks that need to be undertaken by the HEART Board over the next 12 months to provide assurance that the Partnership will be effective. The Board is intent on building on the ambition shown in the original project aims in order to deliver a fully integrated and efficient service.

## **Recommendations**

- a That the progress to provide one, consistent service to deliver Disabled Facilities Grants and a Home Improvement Service for the whole County be noted; and
- b That there is agreement that 2022 acts as a transitional year to allow Authorities to refresh key aspects of the Partnership, act to strengthen it and consider how full service integration could be achieved; and

- c That the strategic objectives of the HEART Board be confirmed; and
- d That the Board's intention to draw on the expertise of Foundations to support it to innovate and develop HEART be welcomed; and
- e That the implications of the White Paper for Social Care for arrangements to deliver Disabled Facilities Grants be acknowledged; and
- f That the recommendation of the HEART Board to continue to build the partnership during 2022 with a view to creating a new legal agreement for a 5 year Partnership from April 2023 be supported.

## **2 Strategic Direction**

2.1 As part of the two year review report a number of key strategic objectives were agreed in order to develop a robust and efficient partnership. These included:

- Specifying and procuring a bespoke IT system to support the case management and reporting undertaken by the service. To include in the project a review of the performance data provided to the Board.
- Using budget reserves to increase the staff establishment and recruit dedicated duty officers support customer assessments and release other staff to undertake home visits.
- Reviewing the level of fee charges in order to revise the staff structure and meet current demand
- The appointment of an experienced consultant to review and recommend efficiencies in systems of work and in accordance with recommendations update procedures.
- The revision of procedures to enable the team to assess the need for urgent action and fast track interventions for customers at an early stage

Progress has been made to deliver all of these objectives however there was a notable task to update and revise the staff structure. This included ensuring HR policies support the team. Unfortunately pressures on HR Teams and the Board members over the last 2 years have meant that this objective has not been met. It will be prioritized during the first part of 2022.

2.2 The current five year Partnership Agreement expires at the end of March 2022. Following meetings supported by Foundations the HEART Board will be recommending that 2022 is a transitional year which will allow it to take stock of the purpose of HEART and seek to complete key tasks to move the service forward towards full integration. The move is supported as best practice by Foundations and reflects the ambitions set out in the Social Care White Paper for this type of service.

2.3 During the transitional year the key tasks for the HEART Board to direct the strategic purpose for the partnership are to:

- Refresh the Business Plan to ensure it reflects current intent and purpose
- Ensure the service delivery model reflects the Business Plan objectives and meets all partners requirements
- Update the staff structure to provide for sufficient capacity to meet the needs of the service and act to develop HR policies which support the team to be effective and efficient

- Complete the installation of the case management and reporting software
- Reflect on the leadership and governance requirements of the HEART Board and update the Partnership Agreement with any changes. Considerations will include appointing an independent Chair to the Board.
- Consider options for reporting customer satisfaction to the Board and key partners.
- Update the Housing Assistance Policy when the Business Plan and service delivery model are signed off

2.4 Underpinning the completion of these tasks will be considerations about how changes are reflected in the Partnership Agreement from April 2023 and clarity about financial arrangements and how costs of delivery are met. In addition the Board will need to set a clear direction for the service with regard to the level of performance it requires in addressing both demand and the quality of delivery.

2.5 The strategic objectives which will define the purpose of the HEART partnership and set a policy context will be reported through the relevant Governance procedures of each Authority.

2.6 Whilst the HEART Board will offer leadership to deliver these objectives it should be noted that the Local Authorities involved act as a Partnership and delivery will depend on the support and capacity in departments such as Finance, HR and Legal to provide advice and information.

2.7 The performance of the HEART Partnership will continue to be reflected in the Warwickshire Cares Better Together arrangements because the services provided can act to improve outcomes for well being. This recognizes the role of HEART in enabling residents to remain independent at home. Interventions include reducing non elective admissions to hospital, reducing delayed transfers of care from hospital, reducing permanent admissions to residential and nursing care and help to increase the effectiveness of re-ablement services

### **3 Social Care White Paper 2021**

3.1 The Social Care White Paper has implications for the HEART Partnership. The Government intends to undertake a public consultation with regard to the legislation which underpins the provision of Disabled Facilities Grants during 2022. Nonetheless the Warwickshire partnership which started to come together in 2011 and culminated in the HEART Partnership anticipates the Government's future requirements for these services. There will be encouragement for Housing Authorities to take advantage of the opportunities for coordination and collaboration that the Better Care Fund offers to "make sure that people can quickly access the adaptations they need, in a way that is coordinated with other practical support they receive."

3.2 The future of services to deliver adaptations referred to in the White Paper is being influenced by Foundations as the representative body for home improvement services. This will continue as Disabled Facilities Grant legislation is updated and guidance is developed to ensure that Local Authorities can meet the needs of their residents and provide efficient and effective delivery of Grant related services.

- 3.3 Whilst the policy framework set out by the White Paper is developed the Government has committed to fund £570 million per year (2022–23 to 2024–25) for local areas to deliver the Disabled Facilities Grants. The Grant for Warwickshire is currently £4.4m.
- 3.4 The White Paper also indicates an intention to provide a fund to deliver new minor repairs and adaptations (effectively funding for handyperson services).
- 3.5 The public consultation on the recommendations of the 2018 Disabled Facility Grant Review is planned for 2022 and will look at:
- The allocation of DFG funding to local authorities.
  - The maximum amount a DFG can pay for a single adaptation.
  - How best to align the means test with the social care charging announced in the Health and Social Care Levy in September 2021.
- 3.6 The HEART Management Board will act to incorporate any new legal requirements brought forward by Government however it will also anticipate any changes that will enhance the service for customers.