Highlight Report:
Referral Assessment and Care Management
September 2007

Purpose of Document:	To provide DMT Programme Board with an update of the progress being made on the Department's Referral, Assessment and Care Management project

Date of report:	11th September
Period covered:	14th August 2007 to 11th September 2007
Budget status:	**Green** The work on budget, efficiency gains, and SWIFT will be taken through DLT, as the efficiency gains are linked to work to RACM projects and not solely the working group (see task number 002 for progress update). Sandra Thomas will attend DLT on 19th September. Progression with separating and reapportioning budgets is dependent on key decisions being made regarding the potential reconfiguration of the Long Term Teams. Reminder: There is still a level of confidence that the savings (approved by Council) of £250k, will be achieved prior to 2008-09.
Schedule status:	**Green** The Access Team went live as planned on 3rd September. The Central Reviewing Unit will be fully operational from 10th September, The Scheduled Reviews Team went live on 29th August.
Planned Activities Underway or Completed this Period	**Overview** Overall this project is on target. See appendix for progress updates on activities undertaken and completed during this period. **Project management** Following the cancellation of the project management sessions dates a training provider has been identified by CSED. Ongoing work is underway regarding the structure of the training and proposed dates for it to be held.
Problems:	
Actual	Staff moving from homecare into the reviewing team is still to be negotiated.

Potential	Learning Disability reviewing staff are planned to move into the Central Reviewing Unit. Some concern that outstanding work to be completed may initially have a negative impact on planned reviewing work. Concerns that the target to complete all Adult reviews by 31st March 2008 may be unrealistic as this is not based on statistical evidence. The "Care Management Long term teams" capacity to respond within Safeguarding Adults time-scales may be compromised as a result of current staff changes.
Planned Activities for next Period	**Overview** The attached appendix provides detailed progress updates on all of the work streams as detailed in PID's and project plans for individual projects. For example for project 004 (Intake) the following is planned activity for next month:- • Develop procedures / pathways for the Access Team. • Continue the work regarding costings for Arrow Park Hospital (APH) with Phil Ashley • Continue negotiations with APH regarding the development of C block However, overall the activities for the programme are as follows:- • "Go live" of enhanced Central Reviewing Unit. • Progress reports to DLT . • Continue to progress accommodation with Arrow Park Hospital. • September communication briefing to be written and circulated • Work on staff intranet page to be finalised
Project Issue status:	No red issues to report on at present.
Project Risk Status	DLT reviewed and amended all of the Risks at the planning day on 27th July. There is a need to escalate one risk that is scored at 16 the highest for impact and probability. This relates to performance Information. Actions are being put in place to manage the risks and to identify a core suite of performance information. Risks to be reviewed again at DLT on 3rd October.

APPENDIX

WIRRAL

Project Name: Referral, Assessment and Care Management
SRO: John Webb
Project Manager: Francesca Tomlin
Date: 14th August 2007

Task Number	Task Description	Duration	Owner	Start date for Task	End date for Task	Progress
001	Obtain Programme Board approval of Business Case		FT	15th May 07	15th May 07	• Completed
002	Develop measures for evidencing and monitoring efficiency gains		FT	16th May 2007	19.09.07	• Progression with separating and reapportioning budgets is dependent on key decisions being made regarding the potential reconfiguration of the Long Term Teams. • ST to attend DLT to discuss this area of work on 19th September. • Budget code has been created for Access team to allow monitoring of expenditure. • Allocation of Access team budget is awaiting activity monitoring figures to identify how budgets should be top sliced across OP/PSD & G.A teams. • Awaiting decisions regarding current localities to inform work on cost efficiencies relating to possible property & associated cost savings. • Currently investigating how to measure savings from work of Intake Team.
003	Identify risks, scores, control measures, ownership & escalation plan		FT	July 07	July 07	• DLT reviewed risks at planning day on 27th July. One risk now escalated on Performance Information. • Risks to be reviewed at DLT 3rd October..
004	Intake: development of initial assessment team		FT/PN	11.9.07	09.10.07	Planned activities underway/completed: • Access Team went live on 3rd September

	aligning with all referrals currently being dealt with by existing locality duty teams					• They undertook two weeks of training from 13th August to 24th which covered essential area's for their new area of work. • Unallocated work tested between 13th August and 2nd September. Working their way through 190 of cases from across OP services. • First site visit to Arrow Park Hospital (APH) has taken place with further work planned with Phil Ashley • Costing out of APH start started. • Negotiations are ongoing with APH regarding the development of C block Planned Activities 11th Sept to 9th October • Procedures / pathways for the Access Team.
005	Self assessment; development of self assessment tool linked to SAP/CAF,intranet etc		FT/PN		1.9.07	• ACAF document now being used within the Access Team. Self assessment can be undertaken using this documentation. • New ACAF tool replaced Easycare with effect from 3rd September following approval at DLT. • Positively promoted self assessment and have seen some good uptake.
006 1st	Reviews; Central Team in place to deliver planned reviews using revised review methodology		FT/SR	11.09.07	09.10.07	Planned activities underway/completed: • The formation of an additional unscheduled reviewing team. Is underway with a planned operational start date of 10th September. • Currently confirming the start dates for the identified staff to come across into the Central Reviewing Unit. • Reviewing paperwork now on ESCR. • Majority of reviewing staff in place by 1st

						September. • Some reviewing staff co-attended training with Access Team. • Pathways for HARTS team completed. Problems: • Staff moving from homecare into the reviewing team is still to be negotiated. • LD staff moving into the reviewing team is planned however work outstanding is likely to have a negative impact on planned reviewing work. • Concerns that the target to complete all adult reviews by 31st March 2008 may be unrealistic as this is not based on statistical evidence.
007	Single Assessment Process / Common Assessment Framework; Development and implementation of new assessment tool		HR		3.9.07	• ACAF document now being used within the Access Team. Self assessment can be undertaken using this documentation. • New ACAF tool replaced Easycare with effect from 3rd September following approval at DLT.
008	CADT; Options appraisal on use of CADT alongside call centre and new intake team including social work input		FT/SP		15.08.07	• Continue to negotiate via the transformational change team how CADT staff can develop with CYPD and corporate information and advice services. • Development of customer services interface/ web based service Problems • Developments and decision re CYPD and corporate call centre is delaying decisions that need to be made around CADT staff..
009	EDT; Options appraisal to be developed covering consideration of other models of 24/7 services,		FT/SP		11.09.07	• EDT staff to move to C block in the next 4– 6 weeks as their new accommodation base.

	construction of an alternative provision that is integrated with CADT/call centre/SPA/new intake team				
010	Safeguarding; Review and options appraisal of processes, procedures, risks, staff roles, training, PR etc	FT/SP		10.09.07	Activities under way • Programme of team briefings is underway to improve team response times • Process established for monitoring feedback to Adult Safeguarding Unit re outcomes of referrals Problems (potential) • Teams' capacity to respond within time-scales may be compromised as a result of staff changes Plans for next period • Complete team briefings • Continue to monitor and follow up outcomes • Review sub-groups
011	Community Mental Health Teams for Older People; Options appraisal on co-location / integration and line management of staff and consideration of other models	PGo		1.10.07	• PID and action plan revised and updated (attached) • Flow chart illustrating intended route for referrals into and out of CMHTOP shared 17/8/07 • Casenotes training for social workers set up for 7/9/07 PID OPCMHT 1 (2).doc
012	Case management; Options	PGo		1.9.07	• LTC Strategy group will have paper to be

	appraisal of creation of specialist OP team, geographical alignment and links with other specialist areas such as OT's, GP's looking at national models. Also includes quantifying number of cases, unallocated case management and definitions of complex cases. Development of case management framework to link to LTC model					 PID CM 1.doc • presented to September meeting • The PID and action plan have been revised and updated.
013	Equipment / Adaptations / Assistive Technology; Implementation of new partnership agreement, revised processes and improvements		PGo		1.9.07	• Report revised and sent to PCT 18th August • Tele conference with CSED on 18th August to update them on developments here • Regional event on 31st August to get update on progress of early implementation of retail model and of other micro sites progress/ issues – Joint Commissioning Manager attended • There are ongoing concerns re: becoming a micro-site. Discussions are taking place between Head of Service, Chief Executive of PCT and CSED. • ICES Board 10/9/07 Planned activities: Report to go to PCT – Joint Commissioning Group 18th September
014	Transition; Implementation of protocol and development of procedures and processes		PGi		1.9.07	• PID signed off by Governance group on 30th July. Draft protocol being presented to O&S Committee 11th September.

015	Integrated ALD Services; Implementation of governance arrangements with Partnership Trust		PGi/SFJ		April 08	• Updated PID to be presented to Joint LD Mgt Team on 13th September. Application made for funding into research project re. Integrated Services.
016	General Adults; Review to determine agreed function of team with specialist services		SP		1.9.08	• Update report went to DLT on 5th September with a view to re-allocating long-term work to enable team members to focus on access/review work. • General adults Team has been decommissioned with staff allocated to the new Central Reviewing Unit, Access Team and PSD Team
017	CMHT Reconfiguration		PGi		07.09.07	• PID presented to DLT 15th August. • HR processes have been drafted and are due for sign off 7th September.
018	Performance Information		RL		11.09.07	• Quarter 1 Performance Report. Signed off. • On server for Overview and Scrutiny Committee on 11th September. • PID on Performance Information presented at DLT 15th August and agreed. • CSCI Annual Performance Assessment Site visit held on 5th September.
019	Public Information		FT/SP		1.9.07	• To present business case, action plan to DLT on the 15/08/07 • Meeting to be held to discuss scope of project and what is within and excluded from scope.