

ANNUAL REPORT & FINANCIAL STATEMENT

2017 - 2018

Direct
Payments

Support
Planning

Workplace
Pensions

Self
Funders

PA
Development

Community
Connecting



Banking &
Payroll

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Board of Trustees 2017–2018

Clare Evans MBE	Chair	Audrey Ekstrom	
Faith Greenman	Vice Chair	Robert Selkridge	
Robert Dickenson	Treasurer	Brian Hollands	
Dean Mackay-Morris		Geoff Woollan	
Heather Tucker		Carol Shirley	[Co-opted December 2017]
April Hammond		Patricia Putland	[Co-opted December 2017]

Staff Team 2017–2018

Geraldine Bentley	Chief Executive Officer	
Mary Reed	Business Development Manager	
Caroline Finch	DP Operations Manager	
Polly Hannan	Office Manager	
Pauline Bishop	Direct Payment Adviser	
Abbie-Jo Lawrence	Support Planning Telephone Adviser	
Junko Woodley	Direct Payment Banking Service	
Matt Stabb	Peer Link Worker	
Julie Dyer	DBS Administrator	
Frances Hanafin	Office Support Worker	
Louise Maddox	Direct Payment Adviser	
Dee McFadden	Direct Payment Adviser	
Lucie Glander	PA Development Worker	
Poppy Witts	Support Planner	
Nicola Harris	Support Planner	
Graham Wickens	Direct Payment Adviser	[June 2017]
Elaine Barker	Direct Payment Finance & Payroll Administrator	[April 2017]
Connie Willoughby	Direct Payment Payroll Administrator	[April 2017]
Nicola Elkins	Finance Assistant	[October 2017]
Nikki Cull	Project Co-ordinator	[September 2017]
David Bolwell	Direct Payment Adviser	[Resigned May 2017]
Judith Ngako	Support Planner	[Resigned November 2017]

Chair's Foreword

Last year we had another successful year delivering the support services for people in receipt of direct payments and developing our work supporting disabled people to be active in the community in which they live. In March this year we were awarded the contract for User Engagement for Wiltshire users, which offers opportunity to all users of adult social care and health services to give their views in ways they choose. In addition, there are a number of smaller contracts we have been able to secure in line with our aim of strengthening the lives of disabled people. All this takes a lot of hard work and I would like to thank all the volunteers, staff, trustees and of course our Chief Executive Officer, Geraldine, who works tirelessly on our behalf for their contributions towards this being achieved- a successful year doesn't just happen but is thanks to the commitment and focus of all involved!

The Trustees have met as a board several times to monitor the budget, assess the risk and discuss our strategic plan and support the Chief Executive Officer on other issues. Our trustee board is made up of 75% disabled people and together with people with expertise on finance and strategy they make the decisions which direct the work of the organisation. We are grateful to Audrey Ekstrom, who retires from the trustee board this year after several years as a member.

I hope you enjoy reading this annual report which shows our commitment to supporting disabled people to live independent lives. We look forward to another year of working to support people on direct payments and with our colleagues, in other User Led Organisations, to provide opportunities for co-production and engagement to all disabled people in Wiltshire.



Clare Evans MBE

Chair

Chief Executive Officer's Comments

This has been another busy and productive year for Wiltshire CIL in all aspects of our service delivery. Our services support people to use their direct payments cost effectively to meet their assessed outcomes and to realise their individual aspirations. We do this through the work of the direct payment team and the support planning team. The services we offer give people control over their own affairs and provides an opportunity for people to lead fulfilled lives and be less dependent on local authority services. People are supported to become active participants in their community if they so wish. All of the services are co-produced with service users who are themselves experts through their individual experience.

During the year the payroll and banking service was brought in-house to Wiltshire CIL and the staffing framework was re-structured to adapt. It necessitated current staff changing offices with the new finance team included in the framework.

The work of the asset based community development has been embedded into all aspects of Wiltshire CIL and staff are trained on a strengths based approach to support people to realise their potential to contribute and be part of their local communities.

In March this year Wiltshire CIL was awarded the contract for User Engagement and this will give us further opportunities to develop our work specifically around Personalisation. We will continue to co-produce our services and the new contract will enable us to further explore and use new initiatives to engage with services users in innovative ways. We will proactively support people to have a voice and to participate in setting the local agenda. We will encourage people to take back the choice and control elements of their lives, not just through direct payments but in shaping the health and social care services that are most appropriate for the local population in Wiltshire.

I would like to thank all the service users who have made such invaluable contributions to all of our work in the past 12 months. I would like to thank the Board of Trustees for their support and direction. A special thanks to Clare Evans who will stand down as Chair of Wilts CIL at this AGM. Clare has been my mentor and supervisor for many years and I will be ever grateful for her nuggets of wisdom and expertise in guiding me. Clare's support, dedication and encouragement in all aspects of CIL's development have been immense. Her contribution to all of our work in the area of disability is immeasurable and she will be greatly missed but I am pleased that she will for now remain on the Board.

We all work in an ever changing, fast paced environment within health and social care. I would like to thank my dedicated and conscientious staff team who are constantly faced with change but who meet it with enthusiasm and embrace it. They consistently demonstrate their commitment to the ethos of Wiltshire CIL to empower people to take the lead over their own lives, as is highlighted in the report that follows.



Geraldine Bentley
Chief Executive Officer

The work of the Core activities of Wiltshire CIL

Principal Aims and Values:

- To provide the means by which disabled people may take control over their own lives, achieve full participation in all spheres of society, and make changes to how they are viewed and treated.
- To provide encouragement, assistance, advice, support and facilitation to individuals or groups wishing to live independently.
- To raise the expectations of disabled people, individually and collectively, and ensure that their voices are heard.
- Everybody has the right to lead an independent life. The aim is to support people in achieving this. To be independent does not mean doing everything for yourself. Independence means having control over your life and having a say over what happens to you.

The key objective of the service is to support disabled people living and working in Wiltshire to have the best opportunities to live as independently as possible and remain active members of their community. For example we support people in a number of ways including:

- With an up to date and easy to access website full of relevant information to support people to make informed choices.
- Providing telephone, email, online, printed and drop-in information and advice on Independent Living & Self-directed Support to disabled people and their families.
- Support to those who self-fund their own social care packages, offering advice and information. This year we offered self funders payroll and banking services as well as access to the PA recruitment resources.

We continue to promote Independent Living in its fullest sense to disabled people, Wiltshire Council and community organisations. Examples this year include:

- The CEO of Wiltshire CIL sits on the Strategic Engagement Board of the Health & Social Care Forum alongside public sector members from both the Council and Clinical Commissioning Group. The group represents an opportunity for senior commissioners and VCSE (Voluntary & Community Social Enterprise) leaders to share information regarding a medium/long term strategy. The group aims to facilitate effective co-commissioning across the system and ensure VCSE assets are a key partner in the development and delivery of strategic health and wellbeing goals locally.

- We work to achieve innovative services that support service users to have choice and control to become self-sufficient in managing their own care and support which is a learning process for service users as well as Wiltshire Council staff.
- Part of our core work is to maintain a legal infrastructure of a Limited Company and Registered Charity.
- We produce audited accounts annually together with an Annual Report and hold an Annual General Meeting.
- We are a ULO with 75% of the volunteer Trustees being disabled people.
- We work with other ULOs and VCSE groups locally and link with the national organisation of CIL's, In Control and Disability Rights UK.
- We are also part of the King's Fund alumni and attend their regular training and network sessions.
- We provide local and national information on the strengths based approach to over 2,500 health & social care customers and staff working in this field via a quarterly newsletter, monthly e-bulletins, Facebook and Twitter campaigns. We continue to improve our use of social media and now have many Twitter followers.
- We continue to develop the Make Someone Welcome campaign with over 80 community groups now signed up and using #MakeSomeoneWelcome.
- We deliver training on strengths based approaches in community development and in working with individuals, to both voluntary and statutory organisations.
- We delivered work on the Disability Research on Independent Living and Learning (DRILL) Project (ImaYDiT) in partnership with Wiltshire Council SEND team and the University of the West of England (UWE). Full details on page 10.
- In partnership with the Tidworth Community Area Board and Marc Read, Community Engagement Manager, we carried out 'The Good Life' pilot based on what people said they wanted from their own community. This was formalised into a report and a graphic and the findings presented to the Area Board to inform local practice and distributed more widely across Wiltshire.
- In this 12 month period we have seen increased burdens on people due to both national and local funding pressure. Examples are: the Charging Policy and FAB re-assessments carried out by Wiltshire Council as well as the national Welfare Reforms with the introduction of PIP and Universal Credit to Wiltshire residents. This led to financial anxiety and a decrease in the take-up of a direct payment as service users were unable to afford the increased contribution. Some people chose to return their existing direct payment to the council. We worked hard with both service users and the council staff to address the issues. We supported Healthwatch Wiltshire by organising and facilitating a meeting to support service users to have a say in order to report directly back to the council on the impact this had on their lives.

We are clear that although we receive the majority of our funding for service provision from Wiltshire Council, we are at heart a grass roots organisation whose remit is to challenge not only national negative impact change, but also the local public sector on its practice and process when it has a clear detrimental impact on peoples' lives. We will continue to work constructively with all sectors to ensure service users have a voice and importantly to advocate for the implementation of Co-production in Wiltshire.

Wiltshire CIL's work is developed within a framework that ensures people are supported to take control of their own lives. The ways in which we deliver a range of services support this through a core philosophy of empowerment. This approach is integral to both our structure and method of delivery and the key part of embedding this is through the influence of service users in the contribution they make to all parts of the service delivery.

This year we were delighted to have won the GSK King's Fund Leaders Award 2018 for our work in Wiltshire.



Left to Right:

Mary Reed, Business Development Manager

Geraldine Bentley, Chief Executive Officer

Caroline Finch, Direct Payment Operations Manager

ImaYDit

(Imagining Young Disabled People's Transition into adulthood in a time of major societal change)

In June 2017 WCIL was awarded funding by DRILL (Disability Research on Independent Living & Learning) to undertake the ImaYDiT project. Working in partnership with the University of the West of England and Wiltshire Council, the ImaYDiT Project set out to find out what a 'Good Life' looks like for young disabled people in modern society.

8 young people from Wiltshire came on board and formed the Peer Research team and they took part in some prepared sessions learning how to run a Knowledge Café.



They then ran two knowledge cafes at Fairfield Farm College. The information was collated in cartoon form.



It was reviewed by the peer researchers and the end report is now in its final draft.



Key Messages:

- ▶ Do not call us 'Disabled young people' – we are just young people with the same hopes and dreams for the future as anyone else.
- ▶ Support us to change the world! We want to contribute to making the world a better place.
- ▶ We want the chance to make our own choices, do things for ourselves and decide on our future. We want a chance to find where we belong; everyone has a place where they feel they belong.
- ▶ We want to get married and have kids: Family love is important.

The work of the Direct Payment Advisers

Wiltshire CIL encourages DP recipients to develop their skills and knowledge to take control and manage their DP. We work in an enabling and supportive way to increase people's independence. We provide advice online and through our office and newsletters, run regular workshops and have a peer support network, including peer mentors, enabling people to get advice and support from experienced DP users.

The role of a Direct Payments Adviser (DPA) is to assist individuals to realise the aim of having a DP which enables them to have increased choice and control over their social care support, whether they are the cared for person, a carer or parent of a child requiring support.

Using a person-centred approach, the DPA will provide information by phone or by email or they will make a home visit – whatever the recipient prefers (and it can be all three).

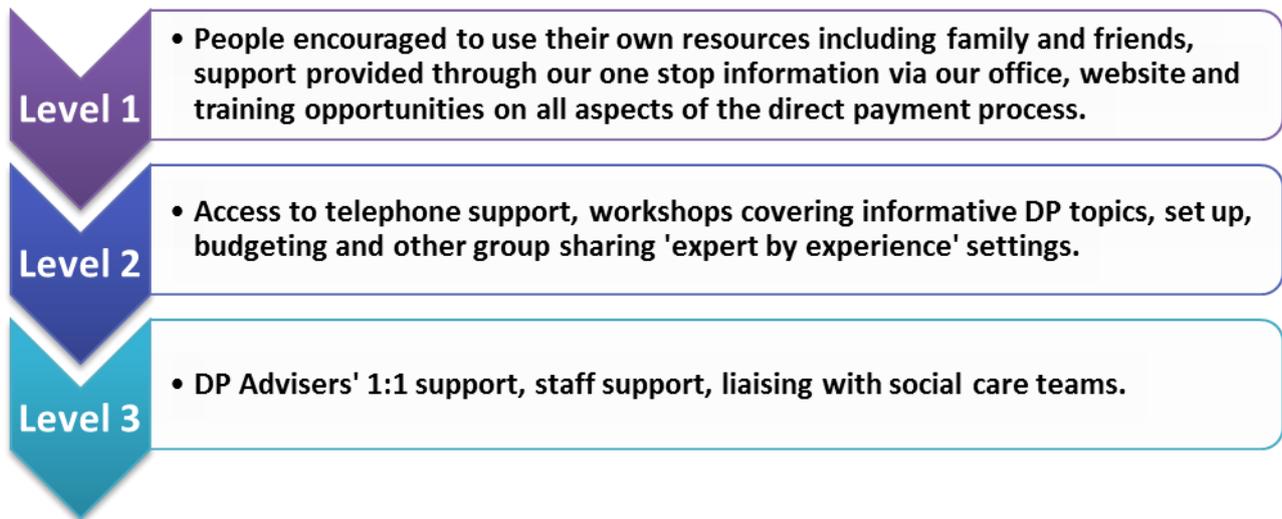
Whilst DPAs provide guidance to all DP users whether they use an agency or whether they employ Personal Assistants (PA's) directly, it is this latter group where they provide the most advice and support – for example on such things as budgeting, payroll and how to be a good employer.

All referrals are allocated to a DPA who will support the individual as follows:

- discuss their responsibilities as a DP user
- provide guidance on setting up a DP bank account
- assist in putting together a sample budget
- discuss the use of agency or employing a PA directly
- provide guidance and advice on how to recruit and employ staff
- provide basic health and safety advice
- provide a service for processing DBS applications for prospective staff.
- provide guidance on obtaining employer's liability insurance
- offer a payroll service, including liaison with the tax office on the individual's behalf
- provide advice on keeping financial records

The DPA will ensure that all processes are completed so that the transition into managing the direct payment runs as smoothly as possible, enabling the individual to gain and maintain control and independence over their care and support. The DP Adviser Team is then available at the end of a phone for any ad hoc situations, problems or other matters on which the DP recipient may require advice or guidance.

The support service is based on a three tier model of support to encourage people to manage their own support and care, as expressed in the following table:



We continually monitor and improve our internal processes to ensure we respond efficiently and effectively to all our customers as well as ensuring we continue to enable people rather than encouraging reliance on our Advisers.

The new contract provided an opportunity for a review of our services especially with the Payroll and Banking Services transferring in-house. The resulting change in the dynamics of the teams offered openings for integration and streamlining which we were keen to exploit to continue to improve our customers' experience of dealing with us.

The Direct Payment Adviser team has had one change this year. David Bolwell was replaced by Graham Wickens who came to us having previously worked for Rethink and Swan Advocacy Services.

In the latter part of the year, Advisers have been coming to grips with the recent clarification that sleeping nights are deemed as working time and the National Minimum Wage applies, so that they can advise both employers who request assistance and workers who request advice on new DP budgets.

Having re-designed our service to make it more effective under the previous contract, the start of the new contract provided the opportunity for a review of the infrastructure that supports our work.

Our case management system, LIBRA, was reviewed and re-designed to better suit the requirements of the new contract and to reflect the transfer in-house of the Payroll and Banking Services.

The transfer of these two services was a major piece of work requiring a reconfiguration of the telephone network, registering as an agent with HMRC and transferring all payrolls to our agency, registering with The Pensions Regulator, purchase of Sage software (for payroll) and Quickbooks (for Banking) and recruitment and housing of additional staff and integration of systems. And all had to be ready for a specific date in April 2017 so that there was no break in service.

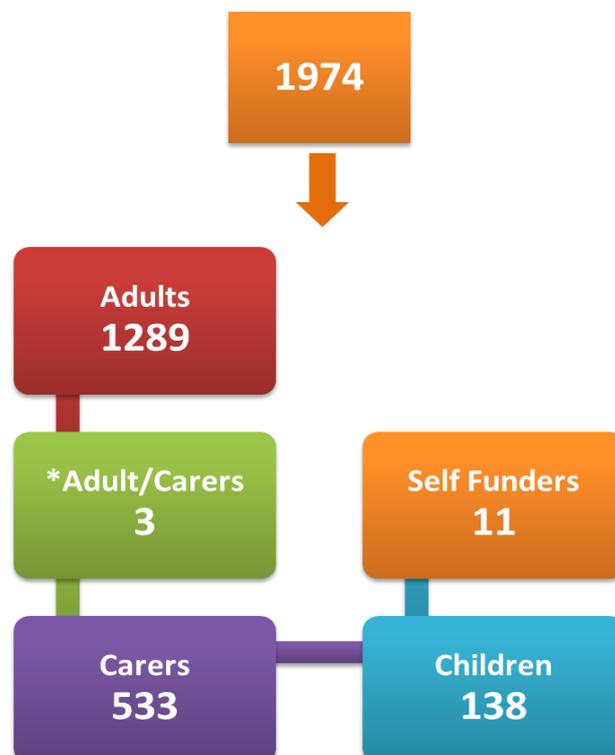
We were fortunate in obtaining the services of an existing and a previous member of Independent Numbers payroll staff (Connie Willoughby and Elaine Barker). In addition, Junko Woodley had already been significantly involved in the provision of the Banking Service together with Independent Numbers for the previous year. That, together with the assistance provided from Jenny Budgetell and her staff at Independent Numbers, and the dedicated work by the Banking and Payroll team members, ensured a smooth transition. We also subsequently welcomed Nicola Elkins as the Finance Team Support worker.

Having the services all under one roof has proved a great success with all concerned finding it easier to get problems sorted more efficiently. It has also resulted in more streamlined communications with new employers as we have been able to merge letters as well as contacts with them.

Following the transfer, we made some small but significant changes to our processes to improve the services and to streamline the back office as much as possible to free up time to spend on customers' issues. For example, changing the date by which people on automatic payroll notify Payroll of any changes; offering an individual emailed payslip service; paying HMRC quarterly instead of monthly; improving the layout and information provided on the bank statements (and at the same time reducing the time spent in sending out the monthly statements by 75%).

The following figures show the work of the DP service in this 12 month period

The total number of customers with at least one service open



* For the first time we have separately recorded those carers who also have their own package of care.

Data for CHILDREN & FAMILIES in the period 01.04.17 – 31.03.18

Children with active and ongoing services: 138

- New referrals during the period 31
- Referrals during the period 20

New referrals received during the period: 31

- CYPDT North and East 12
- CYPDT South and West 9
- Self referral 1
- SEND Team 4
- SUG Children and Families 4
- SUG Learning Disability 1

Monthly breakdown of new referrals: 31

- April 1
- May 1
- June 4
- July 2
- August 5
- September 1
- October 2
- November 2
- December 1
- January 4
- February 0
- March 5

Re-referrals received during the period: 20

- Wiltshire Council 19
- Client 1

Clients closed during the period: 29

- Client moved away 1
- Closed on advice by Wiltshire Council 15
- Did not proceed with SDS 3
- Moved to a direct service 4
- Moved to CHC 2
- Withdrew from SDS 4

Children & Families: Diversity Statistics of total clients: 138

Age range

- Under 18 **77**
- 18 to 25 **55**
- 26 to 54 **2**
- 55 to 74 **2**
- 75 and over **0**

Gender

- Male **84**
- Female **54**

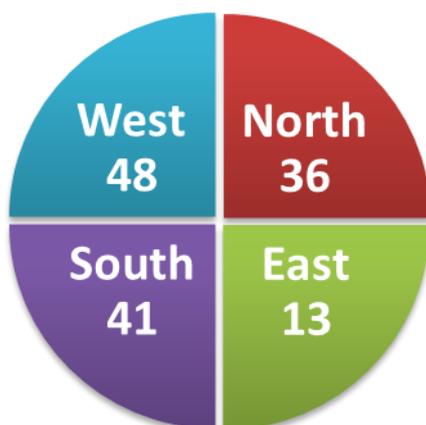
Ethnic Origin

- British White **6**
- Indian **1**
- Not stated **68**
- Other mixed **1**
- Other White **2**
- Sub Saharan African **1**

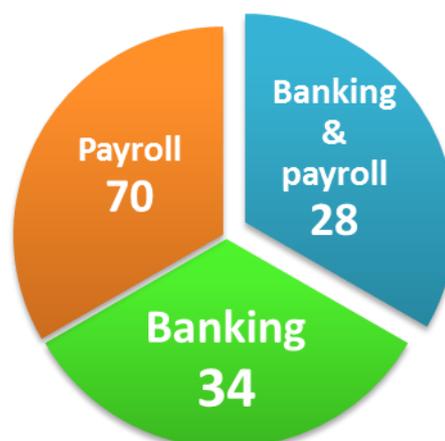
Care Group

- CYPDT North & East **13**
- CYPDT South and West **9**
- Self Referral **1**
- SEND Team **4**
- SUG Children & Families **111**

Geographical Statistics



Children & Families Using Banking & Payroll Services



Data for ADULTS in the period 01.04.17 – 31.03.18

Adults with active and ongoing services: 1289

- New referrals during the period 196 Re-referrals during the period 57

New referrals received during the period: 196

• Amesbury	16	Mental Health Teams	10
• Bradford on Avon/Melksham	13	Salisbury A	13
• Chippenham	26	Salisbury B	13
• Cricklade/Royal Wootton Bass	13	Trowbridge	27
• CTPLD Team	7	Westbury/Warminster	15
• Devizes	9	Other	5
• Marlborough/Calne	29		

Monthly breakdown of new referrals: 196

• April	22	October	19
• May	20	November	10
• June	19	December	14
• July	16	January	16
• August	11	February	14
• September	19	March	16

Re-referrals received during the period: 57

- Wiltshire Council 40 Client 15 Wiltshire CIL 2

Clients closed during the period: 214

• Client deceased	75
• Client moved away	4
• Client no further contact	8
• Closed on advice by Wiltshire Council	18
• Moved to a direct service	21
• Moved to CHC	1
• Moved to residential care	23
• No response from client	1
• Withdrew from SDS	1
• Incorrect referral	1

Adults: Diversity Statistics of total clients: 1289

Age range

• Under 18	0	55 to 74	281
• 18 to 25	56	75 and over	521
• 26 to 54	374	Unknown	57

Gender

• Male	447
• Female	842

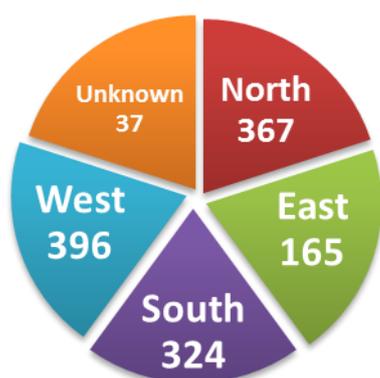
Ethnic Origin

• Anglo-Japanese	1	North African	1
• British Asian	2	Not disclosed	20
• British Black	2	Other Black	1
• British White	409	Other White	13
• Caribbean	1	Spanish	1
• Irish	2	West European	1

Care Group

• Amesbury	23	BoA/Melksham	15
• Chippenham	48	Cricklade/RW Bassett	22
• CTPLD Team	14	Devizes	17
• East Adult Care Team	23	Mental Health Teams	42
• Other	15	Marlb/Calne	40
• North Adult Care Team	45	Salisbury A	22
• Salisbury B	24	South Adult Care Team	51
• SUG Adult Care Team	434	SUG Carers DP	28
• SUG Learning & Disability	92	SUG Older People	32
• Trowbridge	40	West Adult Care Team	72
• Westbury/Warminster	16		

Geographical Statistics



Adults Using Banking & Payroll Services



Data for CARERS in the period 01.04.17 – 31.03.18

Adults with active and ongoing services: 533

- New referrals during the period 129 Re-referrals during the period 30

New referrals received during the period: 129

- Amesbury 1
- SUG Carers DP 127
- Other 1

Monthly breakdown of new referrals: 129

- | | | | |
|-------------|----|----------|----|
| • April | 11 | October | 22 |
| • May | 16 | November | 9 |
| • June | 12 | December | 7 |
| • July | 6 | January | 10 |
| • August | 16 | February | 6 |
| • September | 10 | March | 4 |

Re-referrals received during the period: 30

- Wiltshire Council 28 Client 2

Clients closed during the period: 67

- Client deceased 37
- Client moved away 1
- Client no further contact 3
- Closed on advice by Wiltshire Council 3
- Did not proceed with SDS 3
- Moved to a direct service 3
- Moved to residential care 8
- Withdrew from SDS 9

Age range

• Under 18	0	55 to 74	205
• 18 to 25	2	75 and over	209
• 26 to 54	72	Unknown	45

Gender

• Male	191	Female	342
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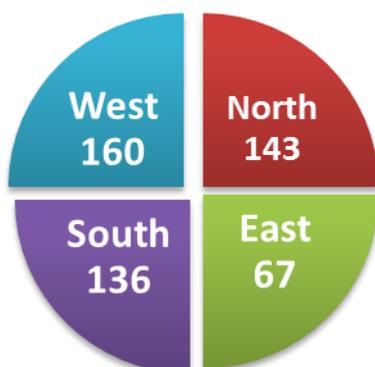
Ethnic Origin

• Bangladeshi	1	East European	1
• British Asian	1	Irish	1
• British Black	1	Not stated	32
• British Other	1	Other White	9
• British White	318	Unknown	165
• Caribbean	3		

Care Group

• East Adult Care Team	5
• North Adult Care Team	7
• South Adult Care Team	11
• SUG Adult Care Team	169
• SUG Carers DP	295
• SUG Older People	6
• West Adult Care Team	10
• Other	10

Geographical Statistics



Carers Using Banking & Payroll Services



Data for ADULTS/CARERS* in the period 01.04.17 – 31.03.18

* For the first time we have separately recorded those carers who also have their own package of care.

Adults/Carers with active and ongoing services: **3**

Diversity Statistics of total clients: 3

Age range

• Under 18	0	55 to 74	0
• 18 to 25	0	75 and over	2
• 26 to 54	1		

Gender

• Male	1	Female	2
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Ethnic Origin

• British White	3
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Care Group

• SUG Adult Care Team	2
• SUG Carers DP	1

Data for SELF FUNDERS in the period 01.04.17 – 31.03.18

Self Funders with active and ongoing services: **11**

Diversity Statistics of total clients: **11**

Age range

- 55 to 74 1 Unknown 10

Gender

- Male 3 Female 3 Unknown 5

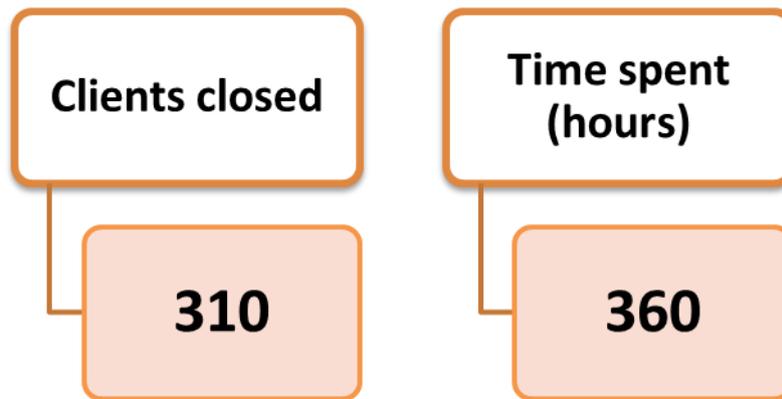
Ethnic Origin

- British White 3
- Not Stated 8

Care Group

- Self Referral 11

Total CLIENT CLOSURES during the period:



The time spent working on closures indicates the significant allocation of time when a direct payment is closed for any of the reasons listed above. It is not simply a matter of closing a direct payment which is not always recognised in the work involved.

Workplace Pensions

The introduction of Workplace Pensions had already made an impact prior to the transfer of the Payroll Service in-house with around a third of employers on Payroll having staging dates for compliance prior to April 2017. The remaining two thirds (approximately 450 employers) were processed between then and February 2018. The amount of work involved in this was considerable taking over 70 additional hours overtime on top of one member of staff working on it almost full time during the working week over a 6 month period. (As employers have to declare compliance every 3 years, we will have to go through this all again starting in June 2018).

We have attempted to simplify the process as much as possible for employers as for many of them being asked to choose and set up a pension scheme is daunting. We have registered ourselves as a delegate authority with the Government's NEST Pension Scheme so that employers selecting NEST could then request us to carry out all the administrative set up on their behalf. So far all employers have gone with NEST. We are also a registered agent with The Pensions Regulator and have re-directed all of their notifications to individual employers (of which there are many) to our address - many of the communications, especially to employers who had no duty to set up a pension, are inappropriate and, as we know from feedback, very worrying. Every employer, with or without a pension scheme, has to make a Declaration of Compliance with the Regulator within a specified time and we have assumed this duty not only to ensure they do not run foul of the law, but as we have all the information required to hand, it is easier for us to do this.

The payroll programme, Sage, has assisted us considerably as it produces the legal notifications every employer at some point has to give to their employees. Towards the end of the year, with 150 pension schemes in place, we reviewed and implemented an electronic data exchange between Sage and NEST. This has cut down on the time taken to

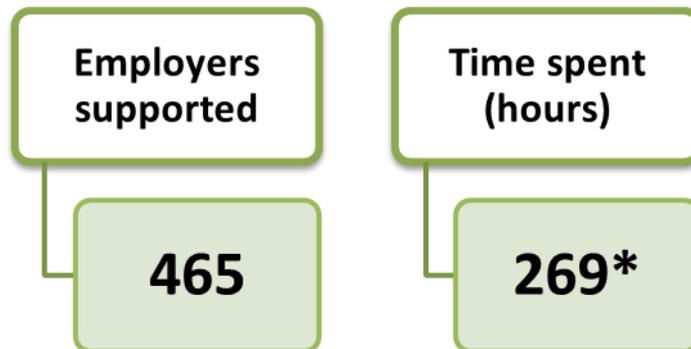
manually load the monthly contributions (by approximately 4 hours), although every scheme still has to be accessed individually to actually make the payment.

Each month Payroll has to run a pension assessment on every employee being paid that month regardless of whether or not they are in a pension scheme. We have estimated that payroll takes an additional 9 hours a month to run now that everyone registered with us is subject to the legislation. This does not include the time spent in communicating with employers and despatching letters for their new employees (or employees whose earnings have changed sufficiently to put them in a different auto-enrolment category) and dealing with ad hoc enquiries. There are on average about 10 new employees a month.

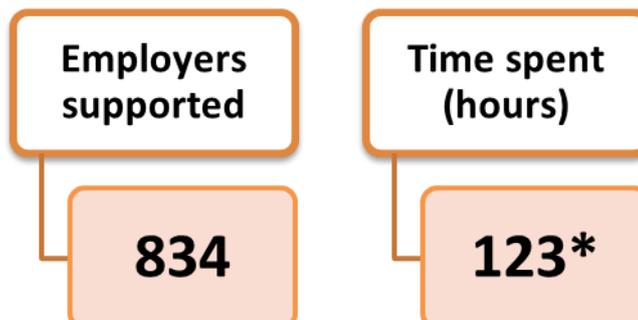
From 1st October 2017, new employers no longer had a staging date. They were immediately subject to the pensions' legislation. We average around 7-8 new employers a month with, on average, one a month who will need to set up a pension scheme. In order to give these people enough time to research and choose a scheme, we take advantage of the rules which allow for employees' enrolment to be postponed for up to 3 months.

As payroll bureaux go, we probably have more than the average number of employees who have temporary pay spikes because of working additional hours on an ad hoc basis. Such spikes can make them eligible for auto enrolment although they may never again earn enough to contribute. To manage this, we have taken advantage of the postponement rule but this also generates letters for the employees which have to be sent to the employer.

1st April – 30th September 2017
(incl. getting 450 employers through their staging date)



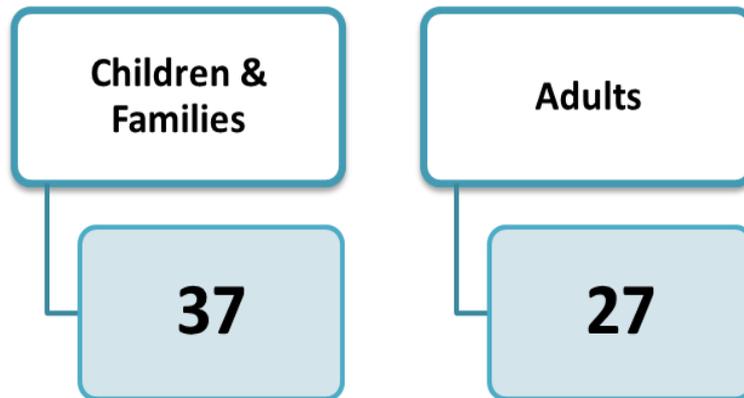
1st October '17 – 31st March '18



***Total time spent = 21.5 working weeks**

Disclosure & Barring Service Checks

Part of our work is to provide a Disclosure & Barring Service (DBS) check for employers when recruiting their own PA's. This is particularly pertinent to Children & Families who cannot have DP council funding released to them until the check has been processed. The DBS worker is part-time and works across Wiltshire. It is an appointment system and she will travel to meet people in the council offices at Salisbury, Trowbridge and Chippenham as well as arranging meetings for the checks at the Wiltshire CIL office in Devizes. A total of **64** DBS checks were processed during the period.

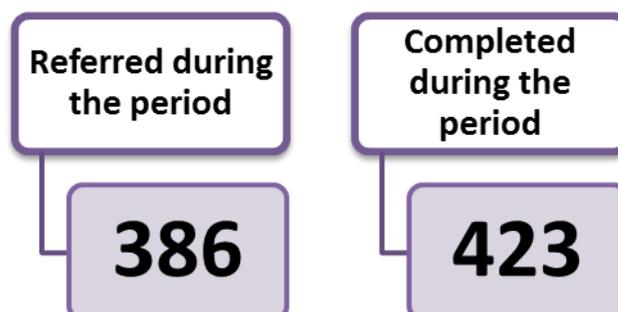


The work of the Support Planning service

This year we completed the pilot review project successfully, the results of which have been reported on separately.

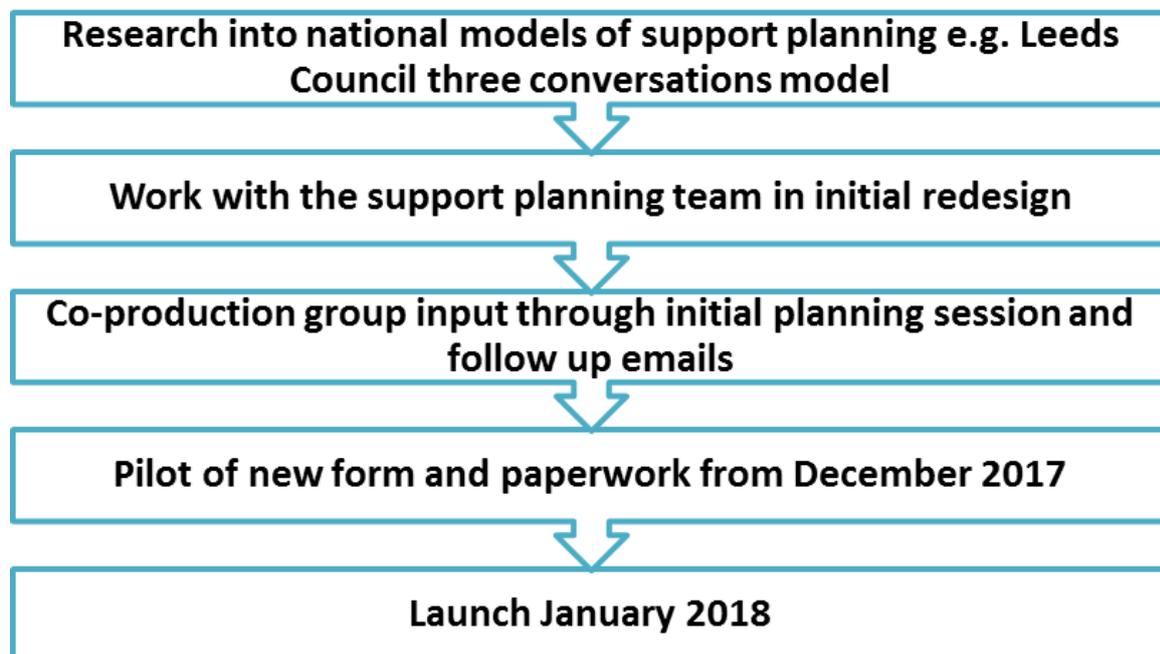
We agreed with Wiltshire Council to keep the 'review; no change' in house. This was a result of customer feedback where it was felt that a support plan didn't add value at that time.

Since August our referral rates have decreased. We are working with Wiltshire Council to address these issues and identify ways in which the service can be developed in line with their transformation agenda.

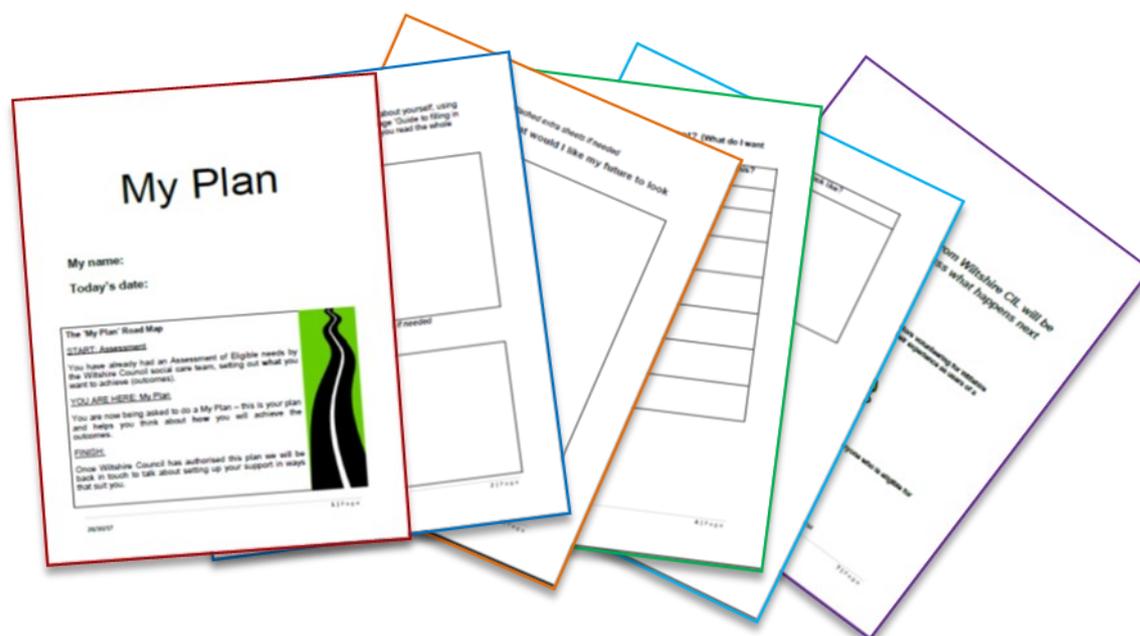


Service User input into Support Planning service

This year we have undertaken a re-design of our support plan template in response to customer feedback. The redesign process was as follows:



The form has been significantly streamlined, with a separate step by step guide and budget sheet. Early feedback indicates that it is more ‘user friendly’, enabling it to be more person-centred.



140 feedback forms were completed. Of these 103 support plans were completed with a home visit. The evaluation form consists of a number of statements which people are asked to score using a 1-5 scale (1= strongly disagree, 5 = strongly agree).

I understand the purpose of the Support Plan: Average rating 4

Comments: "Poppy is amazing!" "Not really as already in review!" "not completed as person has dementia"

The Support Plan has changed the way I think about and plan my support: Average rating 4

Comments: "not completed as person has dementia" "About the same" "it clarifies it" "Not really, more paperwork and visits"

I received an adequate level of support to complete my Support Plan: Average rating 4

Comments: "Helpful" "Need as much support as possible to fill in forms" "Nicola Harris was extremely helpful" "Completed for me as already have a massive work load" "friends completed it"

Developing my Support Plan was a good experience for me and was simple to complete: Average rating 3

Comments: "Quite difficult to understand terminology and bands for support" "This was done by Poppy Witts" "Confusing" "The Finance pages are complicated" "I have found it difficult to accept that I need help" "not completed as person has dementia" "The support plan would have been harder to put together without the help and assistance of Poppy!" "Because I struggle with meeting new people because of my anxiety" "Due to my illness" "No, more inconvenience! More time taken to do paperwork!" "It is easy, but made easier and less stressful with a home visit! Thank you."

*Completed before SP redesign

The Support Planning service was useful to me: Average rating 4

Comments: "Most helpful" "Very helpful and supporting" "Very nice people. Top marks" "Nicola's advice was helpful"

Wiltshire CIL staff were helpful and friendly: Average rating 4

Comments: "...very friendly" "Completed myself but knew support is available if needed" "Very helpful" "Poppy was brilliant!" "5 star service" "Completed by family" "Yes" "Nicola was very helpful"

Stories of Community Connecting work

Support Planners work with our Peer Link Worker to support people to connect with their community, set person centred goals and find ways of achieving them. Below are examples of their work.

The majority of referrals come through support planning. However, social workers have started to contact us directly about people who are not on a Direct payment. We try and provide support to these people if we have capacity.

Toby

- Toby is a young man who is already active in the community, taking part in football, horse riding and table tennis on a regular basis. Toby also attends Beversbrook to do voluntary work when needed. He would like a PA (driver) to support him to do a job, voluntary or paid (to support him to carry out the role and be there in case he has a seizure). Toby was linked in with Lucie, our PA development worker, to help source a PA. He has also become a peer researcher in our 'ImaYDiT project'. Support was given to Toby so that he could access the Building Bridges project and receive help from a job coach; he was also given information on a disabled railcard and the Dolphin's Den business course.

Social Worker Referral

- Mr A has no social activities; he used to go to arthritis care club, but now stopped. He uses a scooter, but can't use public transport. He gets lonely at the weekends, but does go for brunch and to car boot sales. His present social activity revolves around visiting Morrisons supermarket. He would like to find someone to play scrabble with. After a conversation with Mr A, in his own home, Matt completed a Building Bridges form on his behalf and sent him details of the local Men's Shed. Matt also liaised with the local U3A, and found a scrabble club that Mr A can join, Matt helps fill in the membership forms. Mr A rang back in to say he has been allocated a key worker through the Building Bridges project, and to thank Matt for the support. They are meeting again to see how things are going.

Ken

- Ken is an older person who lives on his own, a conversation in Ken's home revealed that Ken is lonely and would like to meet up with more people. Matt, our Peer Link Worker put Ken in touch with the local Men's Sheds, Ken feels like he could do with a little extra support to attend the first session so Matt will be going along with him.

Social Worker Referral

- Matt met with a young man at his home. His step mum is concerned about him as he lacks confidence and stays in his bedroom a lot. Matt worked with him to help build confidence; the young man is now going out and meeting up with friends. Matt also gave him information on a disabled rail card, and will continue to meet with him to help with confidence and getting out and about.

Rachel

- Rachel had moved into Wiltshire from out of area. She had previously really enjoyed working at a local charity shop; she got to meet people and felt part of her local community. Moving to Wiltshire it wasn't feasible that Rachel continued to go to her old charity shop, which was some distance. The support planners worked with her to find ways in which she could increase her confidence to get out and about and find new volunteering opportunities close to home, helping her make those local connections. Her outcomes including employing a PA in the short term, who could give her confidence to get out in the community, providing her with positive support to help her get charity shop work and into social groups in Trowbridge.

Overall figures for the whole DP contract

Over the period 1st April 2017 – 31st March 2018 we have had **2,284** individuals on our books to whom we provided **3,798** separate services.

Our Services

Direct Payment advice & support	Support Planning	Banking	Payroll	Community Access	Self Funders support
DP	SP	BK	PR	CA	SF

	Adults	Adults/ Carers	Carers	Children & Families	Self Funders	TOTAL
Number of people:						
Open	1289	3	533	138	11	
(Closed during the year)	(214)		(67)	(29)		
Total number of people	1503	3	600	167	11	2284
Number of services: *						
Open	1932	6	655	245	11	
(Closed during the year)	(780)	(2)	(102)	(65)		
Total number of services	2712	8	757	310	11	3798

*Breakdown of services: 3798	Adults	Adults/ Carers	Carers	Children & Families	Self Funders	TOTAL
DP : Open	1246	3	520	134		
(Closed during yr)	(234)		(73)	(30)		
Total number of services	1480	3	593	164		2240
SP: Open	23	1				
(Closed during yr)	(419)	(2)		(1)		
Total number of services	442	3		1		446
BK: Open	264		40	34		
(Closed during yr)	(77)		(7)	(10)		
Total number of services	341		47	44		432
PR: Open	326	2	94	70	1	
(Closed during yr)	(48)		(22)	(22)		
Total number of services	374	2	116	92	1	585
CA: Open	73		1	7		
(Closed during yr)	(2)			(2)		
Total number of services	75		1	9		85
SF: Open					10	
(Closed during yr)						
Total number of services					10	10

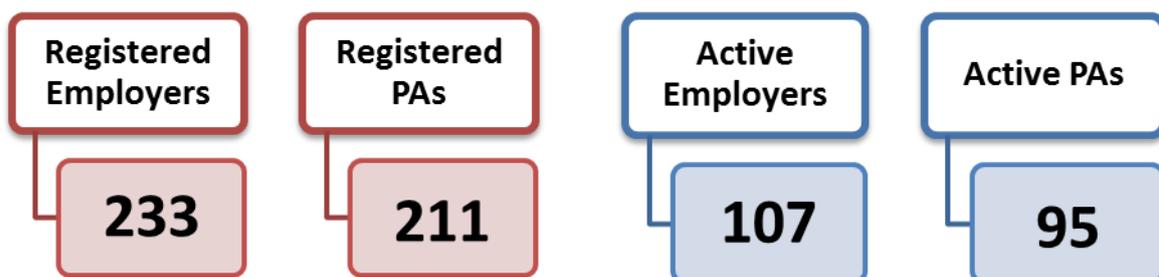
PA Register & Development Work

As part of the role the PA worker sits on the national Skills for Care PA Framework Steering Group. The group addresses matters and is involved in relevant research projects that aim to tackle current or projected issues with the Personal Assistant workforce. She attends the quarterly meeting at the Skills for Care offices in London where she networks with people from other organisations, individual employers and PA representatives. She gains an insight into new approaches and initiatives which are shared, when relevant, with our users with a view to improving the quality and availability of the PA workforce in order to maintain the viability of a successful Direct Payment option.

The PA Development worker also sits on the Wiltshire Workforce Action Group (WWAG) which meets monthly. One of the main focuses of the group at the moment is to work together across all of the services in Wiltshire to tackle the issue of recruitment into the Health and Social Care sector. This has resulted in the development of a website called 'Proud to Care Wiltshire', a branch from the website 'Proud to Care South West'. The website promotes working and living in Wiltshire and will eventually lead to organisations being able to advertise their vacancies.

PA Register

There were 233 employers and 211 PAs registered on the Wiltshire CIL online PA Register. Of these 107 employers and 95 PA profiles were active. An active profile shows where someone is actively seeking a PA or actively seeking work, i.e. they have an advertisement on display.



PA Recruitment

We have supported employers with advertisements through the Job Centre, Job Boards and printed adverts displayed locally. **55.77%** were successfully filled with our support.



Training

As a result of funding from Skills for Care we were able to provide training to 24 people with a total of 34 learning outcomes.



Feedback Forms

Individual employers (IEs) who had received support to recruit PAs during this period were asked to complete a questionnaire to measure certain factors.

	< 1 year	1-2 years	3-5 years	10 years +
How long have you been an individual employer?	33%	17%	33%	17%

	Word of mouth	Job Centre	Local Ad	Uses Agency	PA Register	Social Media
How did you find your current PA?	2	1	2	1	1	1

From the responses we received we found that a range of avenues are utilised, all with similar success rates.

	Really Easy	Easy	Hard	Extremely Hard
How would you rate the ease of finding a PA?	16%	16%	16%	52%

Most employers who responded found recruiting a PA extremely hard

	1-2 yrs	2-5 yrs	< 6 months	5 years +
On average how long do the PAs you employ stay in post?	2	2	1	1

From the results gathered it is encouraging to see that, from the IEs who responded, PAs stay in post longer than one year

	Yes	Would ask Wiltshire CIL
If your PA requested relevant training, do you feel you would know where to find out about these courses?	83%	50%

	Training felt to be important	If cover was available	Not answered
Would you be happy to release your PA to complete training?	17%	17%	66%

From the findings we can see that recruiting PAs is proving to be challenging but that IEs are utilising a range of advertising opportunities and know where to find out about training and willing to invest time in supporting their PAs to expand their skills and knowledge.

Some of the PAs who Wiltshire CIL had contact with during the period were asked to complete a questionnaire to measure certain factors.

Of the 17 PAs contacted, 12% responded. Although this is a disappointing response rate, we were still able to gather some meaningful information, as illustrated below.

	< 1 year	2-3 years
How long have you been employed as a PA, either with your current employer or with previous employers?	50%	50%

	Social Media	Wilts CIL advert
How did you find out about your current PA role?	50%	50%

	Yes	No
Do you feel valued in your role?	100%	0%

It was good to hear that all of the respondents did feel valued in their PA role. One respondent stated *“I have regular supervisions and my employer tells me regularly that he values my support. We have a great employer/employee relationship”*.

	Yes	No
Do you feel you have access to training courses to help you in your role?	100%	0%

It was encouraging that all respondents felt as if they had access to training opportunities.

Do you feel as if you would be supported to access/attend training courses to help you in your role?	<p>One respondent stated: <i>“I am offered adequate free training which I attend as my job role allows”</i>.</p> <p>Another respondent stated: <i>“My employer regularly asks if I would like to do any training and I am aware of the training available.”</i></p>
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From the data collected we can see that PAs do feel valued and they are aware of training opportunities. However, the response rate and level of engagement with the questionnaire does limit the scope and validity of these findings.

Telephone survey results

KPI 1: People with a direct payment receive the right advice and support at the right time enabling them to self-manage all aspects of the direct payment.

Are you happy with the support you received when you were completing your support?

100% were happy with the support they received

- | | |
|--|--|
| • Very happy | Brilliant, supportive from start to finish |
| • Good job | Very good and polite |
| • It works well | Very good telephone support |
| • SP is a bit wishy-washy: one size fits all | |

After the initial contact and visit with a DP advisor did you feel you were given enough information and support to make you feel confident in managing your DP?

89.36% Agreed

8.51% Disagreed

2.13% Not applicable

- | | |
|---------------------------------|---------------------------------|
| • Chased twice via email | Very easy to obtain information |
| • Confused about pension | Confusion using DP |
| • Very good | Advice on self-employed PAs |
| • Very helpful | Works well |
| • Very supportive | Absolutely |
| • I was given plenty of support | Very useful very helpful |
| • Kind and helpful | Marvellous |

Did you have to speak to an advisor after their initial visit and set-up? If so, can you tell us what it was about (generally)

44.69% required contact with an adviser

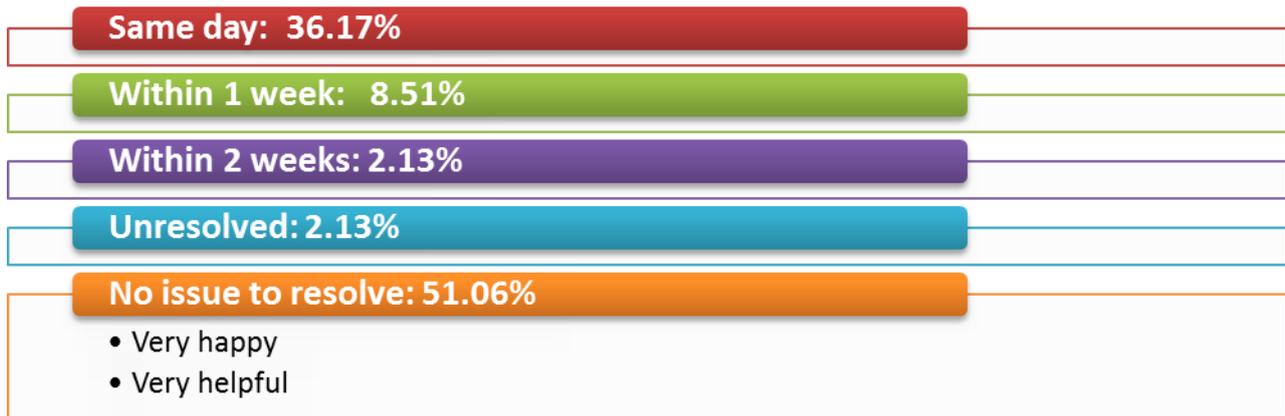
46.80% did not require contact with an adviser

2.13% required time to process information

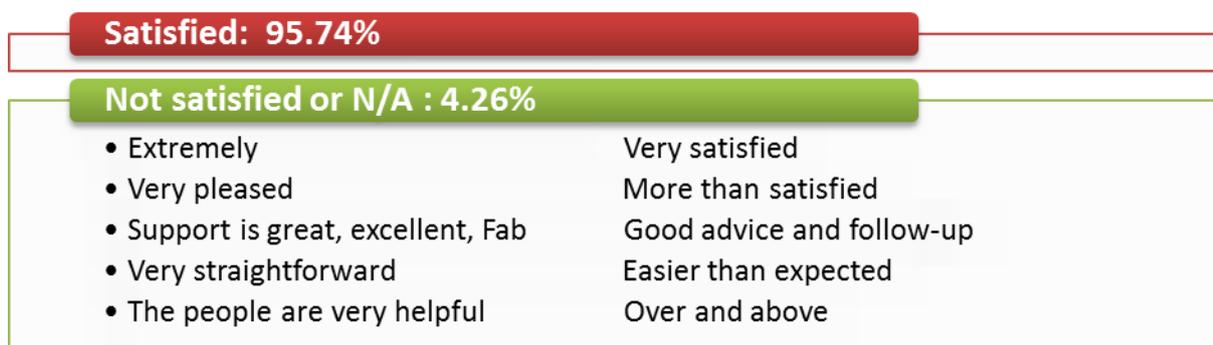
6.38% could not remember or N/A

- | | |
|-------------------|----------------------|
| • Tax queries | Pension query |
| • General queries | Very happy |
| • All ok | Needed clarification |
| • Tax issue | Holiday hours |
| • How to proceed | DBS check |

How long did it take the DP advisor to resolve your issue to your satisfaction?



Overall are you satisfied with the service you have received from Wilts CIL?



If not, what other support would you like to have?



KPI 4: People are supported to become good employers, who understand their legal duties and are able to support PAs to do their job well.

Did the DP Adviser give you enough support and information about employing your own staff? If no, what further support do you think is needed?	100% = Yes
Did you use the PA Register and if so, how did you find it?	100% = No
How did you source your PA? [with or without support of Wiltshire CIL]	50% WCIL 50% Other
Were you supported by the PA Development Worker to recruit your PA? If so, was this the right level of support? Was there anything missing?	100% = Yes Exceeded expectations
Has your PA accessed any of the training? Did this meet your needs?	None of the respondents accessed the PA training

Summary Statement of Accounts

Statement of Financial Activities For the year ended 31st March 2018

	Notes	Unrestricted Funds		Restricted Funds		Total Funds			
		£	2018	£	2018	£	2018	£	2017
Income from									
Donations		-	-	-	-	-	-	-	885
Investment income		-	-	-	-	-	-	-	-
Activities to further the charity's objects:									
Grants & contracts			38,035		482,374		520,409		451,883
Service delivery & other earned income			1,044		-		1,044		1,546
Total			39,079		482,374		521,453		454,313
Expenditure on									
Charitable activities	[2]		42,446		460,034		502,480		503,136
Total			42,446		460,034		502,480		503,136
Net [expenditure]/income			(3,367)		22,340		18,973		(48,8230)
Reconciliation of funds			32,435		9,338		41,773		90,596
Total funds brought forward									
Transfer between funds			-		-		-		-
Total funds carried forward			29,068		31,678		60,746		41,773

Compliments

“

Each time I call everyone is professional and friendly

Thank you very much; it was a lot of work and I appreciate it

Thanks for going that bit extra

...my heartfelt thanks to you and all your staff for the help...

I am very grateful for all this help, it is working out well... and has lifted a massive weight off my shoulders.

Thank you for explaining everything to me so patiently.

The new statements are a great improvement...

My PA is amazing!

It was very reassuring that my account will be handled with efficiency...

”

Thank you to our funders

Working in partnership with



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Working for Choice, Independence & Lifestyle

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