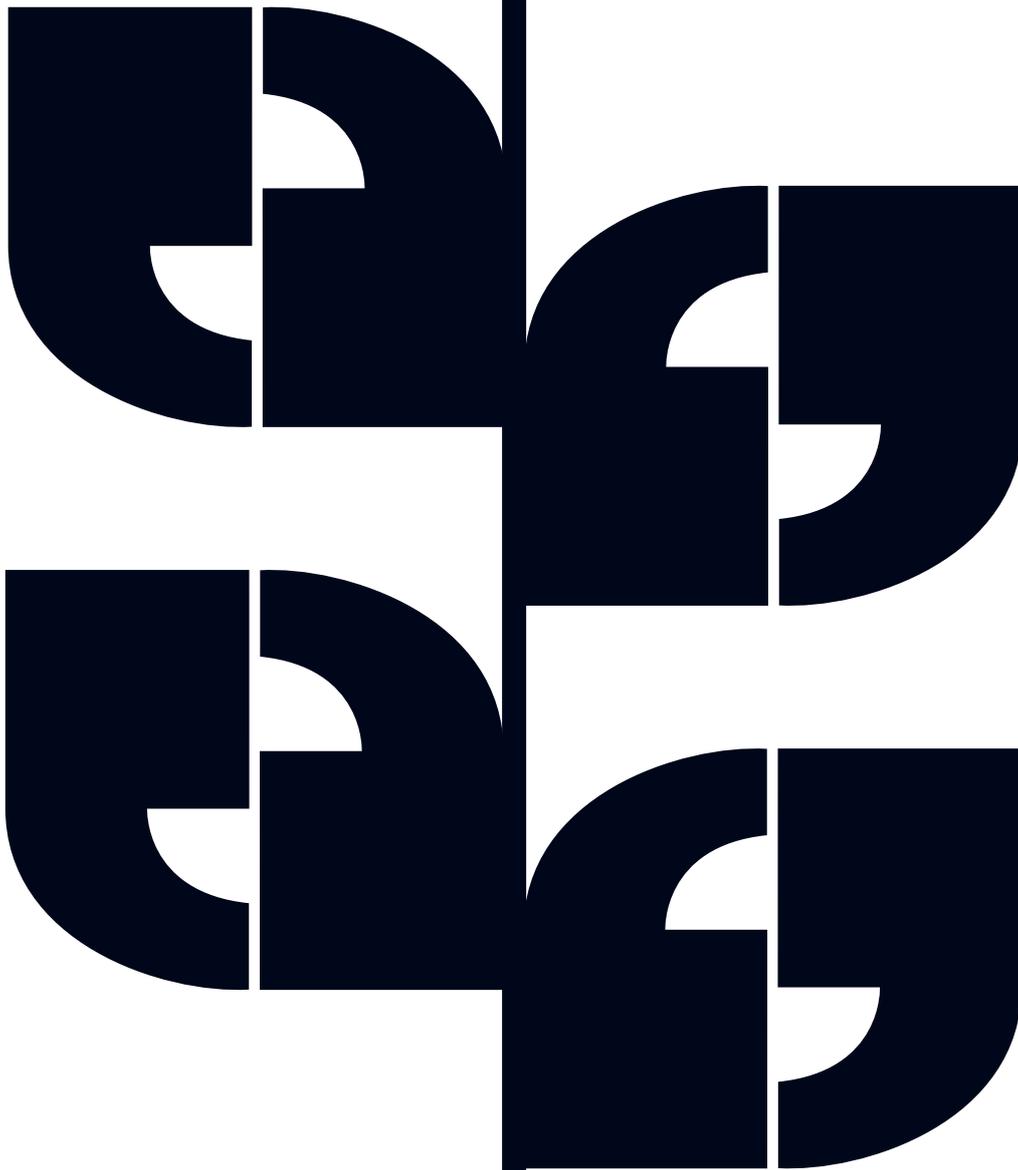


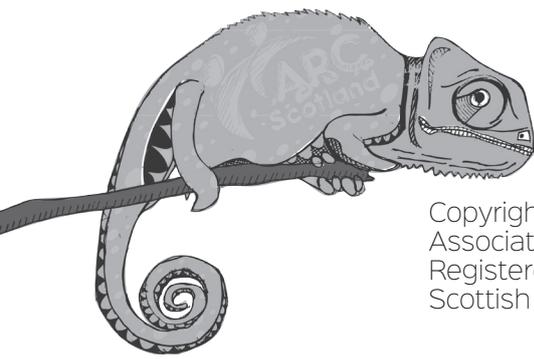
Working together in challenging times:

The value of local forums for
social care organisations





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Introduction

This short report provides learning from ARC Scotland's experience of facilitating local forums for adult sector social care provider areas in Scotland over a six-year period. Given the very challenging economic climate in which we work, we aim to inform and encourage collaborative working as a practical way to improve outcomes for the people we support.

ARC Scotland facilitates forums for provider organisations in the following eight local authority areas: Aberdeen, Aberdeenshire, Angus, Dumfries & Galloway, Dundee, Fife, Perth & Kinross and Scottish Borders. Membership of totals approximately 400 people from 174 different organisations. This comprises of:

- 69 voluntary sector service provider organisations
- 66 independent sector service provider organisations
- 28 advocacy, self-advocacy and advice organisations
- 11 statutory sector organisations

Many organisations (particularly those from the voluntary sector) are members of more than one local forum, reflecting the different local authority areas in which they work. Most forum members have a management or leadership role within their organisation.

The average number of organisations that participate in the forums is 40 (highest 93, lowest 17) with an average membership of 55 people (highest 128, lowest 44).

The organisations represented include those who support people with learning disabilities, autism, physical and sensory disabilities and mental health problems.

Four areas also had separate forums to build capacity of provider organisations to implement self-directed support that were supported by ARC Scotland between April 2012 and March 2015. These include representation from older people and children's organisations, as well as those who support adults.

Most of the following information was gathered directly from professionals who are members of the forums. To achieve an impartial picture, we commissioned an external evaluator (Graeme Reekie from Wren and Greyhound Ltd) to conduct an on-line survey and series of semi-structured interviews. This included meeting with representatives from the voluntary and independent sector provider organisations, local authority commissioning managers, self-directed support leads and self-advocates. Our thanks to all who participated in this.

Summary of findings

Outcomes

Our external evaluation identified the following outcomes associated with membership of local forums for social care organisations:

- Practice is improved and better-informed
- Improved capacity to develop outcomes-based methods and approaches
- Increased efficiency and reduced duplication of effort
- Improved relationships, understanding and links between local authorities and providers

Challenges

The following challenges are shared by each of the forums to a greater or lesser degree:

- Commercial conflict- although most providers are prepared to set aside commercial interests to work collectively for the benefit of the people they support
- Austerity measures- the impact of being expected to do more with fewer resources
- Attendance- as a result of the above, some professionals find it difficult to make time to attend forum meetings
- Relationship with the local authority- critical for success, however it is important that ownership of the forums remains with providers
- Involvement of supported people- more important to some forums than others
- Measuring impact- to what extent do the forums lead to improved quality of life for supported people?

Supporting the forums

Forum members value the following approaches to external support:

- Independent facilitation- it is important there is no perceived, or real, conflict of interest with the organisation that leads the organisation of the forums
- Expertise and connectedness
- Ability to provide a national overview
- Dissemination of local and national information

ARC Scotland's role has a combination of administrative functions (circulating information, producing notes etc.) and providing facilitation skills and sector knowledge at a strategic level. The views of forum members about the role of ARC Scotland follow in section 9 of this report.



Getting Organised

Each forum was established by provider organisations to meet their needs locally. As a result, there are differences between each of them. For example the forums in Aberdeenshire, Dundee, Scottish Borders, Perth & Kinross and Dumfries & Galloway are open to organisations that support people with learning disabilities (although most of the organisations that attend support more people with other needs). The others are open to all adult-sector social care providers who operate in that area.

Most forums meet every two months. The agenda for most meetings include sharing of information between member organisations, input from the local authority and an information session concerning a local or national development issue. Most forums also organise separate learning events- further information about this is shown in section 5.

Each has a Chairperson, elected from their membership, who serves terms between one and three years. Some also have a vice-chair. ARC Scotland have previously sought to arrange for forum Chairs to meet collectively to share learning, however the Chairs found it difficult to commit time to this. Each forum has developed a 'Terms of Reference', however none are constituted as independent organisations.

Between meetings, members share information by email on local news and developments. This results in considerable email traffic that is administered by ARC Scotland. Each forum also has its own pages on the ARC Scotland website.



Relationship with the local authority

'The provider forum is part of our governance structure, and enables providers to raise issues, and to respond to issues as they arise'

Team Manager Joint HSC/LD Service

Forum members tell us that the relationship between the forum and local authority is of critical importance to them. There are some variations about how this relationship is structured; some forums include senior local authority representatives (Commissioning Managers, Self-directed Support Leads, Area Managers etc.) within their membership. Others invite local authority representatives to attend forum meetings, but not as full members.

However they choose to organise membership from senior local authority representatives, each forum has established formal links with a wide range of local planning and decision-making processes connected with progressing social care and health issues.

The forums provide a mechanism that helps to ensure good communication between the local authority and providers as a collective body, rather than providers raising issues concerning local developments individually.

Issues addressed

'We use the forum to talk about things like outcomes and how providers would measure how successful they are in their service delivery by changing the way they structure the support plans, using different tools like Talking Points.'

Service Manager, Adults

At meetings, forum members identify issues they wish to address collectively and the action steps required- including where learning needs exist and how they can be met. Some forums have developed work-plans that are reviewed during meetings, whereas others have been less interested in structuring their work in this way.

While there are some regional variations, most of the over-arching issues are common to all of the forums. At the time of writing (May 2015), the most pressing of the common themes are:

- Staff recruitment
- National Minimum Wage and sleepovers
- Commissioning frameworks and contracts
- Outcomes approaches and frameworks
- Self-directed Support implementation
- Supporting clients in hospital settings
- Approaches to user involvement

National legislative and policy developments are also addressed. Members tell us that the forums provide a useful function in helping them to filter large amounts of information that they would otherwise struggle to keep up with. Key policy and legislative initiatives that all forums are currently engaged with are:

- The Keys to Life (local and National strategies)
- Scottish Strategy for Autism (local and National strategies)
- Social Care (Self-directed Support) (Scotland) Act
- Health and Social Care integration

Forum meetings typically involve some external input on a development issue or matter of concern, from either a local or national perspective. Recently this has included:

- NHS Education for Scotland 'Strengthening the Commitment'
- Care Inspectorate Keys to Life inspection area focus
- Local Adult Support and Protection Committee

Funding

Funds to establish the first 4 forums were secured by ARC Scotland in 2008 through Scottish Government Section 10 and Big Lottery Fund awards. More recently, funds have been awarded to ARC Scotland, on behalf of the forum members, through the Scottish Government Learning Disability Development Fund and Self-directed Support capacity-building funds (2012-15).

A small proportion of the funds necessary to support the forums are raised through the payment of ARC Scotland membership fees. This is purely voluntary and not a condition of forum membership.

What's it like to be a forum member?

Members tell us they enjoy working and learning together, as part of a group of people with shared interests. They are able to build productive, positive relationships in a safe space. Providers' potential competitive interests can largely be put to one side, in order to improve practice and make life better for the people they support.

'There is less feeling of "Well, I can't tell you anything about this because you're going to be copying it and putting me out of business", there's none of that. There's a great sense of sharing, in fact a lot of them work together quite closely now.'

Contract and Commissioning Officer

'As a small independent, some of the larger providers will not engage with you. Being part of the forum has introduced me to other providers and enabled me to show I have something to share which is helpful to all.'

Forum member

Managers of service provider organisations particularly value forum membership because it allows them to have conversations with Commissioners that would not be possible, or as constructive, on their own.

'It's very useful to have regular representation from senior people in Social Work, Health and Finance, and get the chance to feed in to other plans. Head of Finance at (the) Council will come along to share info on new contracts or systems.'

Forum Chairperson

Forums equip members to engage in conversations about, and make active contributions to, local and national policy. Having formal links to planning and governance structures also allows collective contributions to be made. In turn, this gives planners more confidence in the representativeness of the views they hear.

'The forum is part of the governance structure for learning disability, with a formal recognised position with a very positive role and presence about taking forward plans on behalf of people with learning disabilities and their families.'

Forum Chairperson

Service providers also report that being involved supports their own professional development – forums are sometimes a manager's only source of peer support. Membership helps them to scan the horizon and anticipate changes in their external environments.

'I think that one of the things that was especially useful was the people coming together and finding that the issues that each individual was facing were being reflected across the piece and so you felt that it wasn't just you.'

Forum member



Most respondents are able to make clear links between their membership of a forum and their ability to support a better quality of life for the people they support.

'These things are really, really important, and the more we can share, it has to lift everybody up. You want to cascade this information because part of that increases the morale and the self-esteem of the staff, who then in turn deal better with our guys...It has to improve the status and the professionalism of the whole sector.'

Forum Chairperson

Public sector officials benefit from an exchange of information and ideas with provider organisations. The forums allow Local Authorities/Health & Social Care Partnerships to share information and consult with providers as a collective. This has led to the improved functioning of forums, for example increasing membership; allowing complex issues to be resolved and increasing the empowerment of providers.

'It is a good opportunity for me to share info with providers about what's happening in the Council – very beneficial for my role. It's a very valuable forum to have a link with, a first point of contact with service providers – a sounding board for consultation about changes going on in the Council. It's been really valuable for that'

Service Manager Adults

'As a commissioner I see it as very helpful. Presentations at the forum get a great level of engagement. People take notes and arrange to meet colleagues outside meetings. It's invaluable.'

Service Manager Adults

Outcomes

Our external evaluation identified the following four outcomes associated with forum membership:

Practice is improved and better-informed

Improved capacity to develop outcomes-based methods and approaches

Increased efficiency and reduced duplication of effort

Improved relationships, understanding and links between local authorities and providers

Outcome 1: Practice is improved and better informed

From a provider perspective, the forums have been useful for learning from other organisations' practice, and feeling better informed about local authorities' plans. Providers welcome having a collective voice for influencing policy implementation, for example with Self-directed Support. Providers feel more empowered by working together, even in areas where local roll-out has been relatively slow.

'By coming together you actually see what other people are grappling with and hearing what the local authority is doing, but in a real way, not just looking at a minute of a meeting or something like that...it helps you in that (SDS) journey, rather than people all trying to do it just on their own.'

SDS Working Group member

From a local authority perspective, this collective voice is very welcome, as it gives commissioners access to more reliable intelligence about what is happening on the ground, including up to date information on service users' changing needs and priorities.

'(I was not getting) good quality information, no kind of collective view from the sector. They're all competing for money so it's sometimes quite difficult to get a group like that to work together and share their collective views with us. You need to facilitate that quite carefully.'

Planning & Policy Officer

In addition to sharing information amongst members, the forums have used the resources available to them to organise training events that bring external expertise into their area. This is seen as preferable to attending the learning events that are usually held in the central belt as it enables discussion about the local context and application of national initiatives. National organisations that have delivered learning events through local forums include: CCPS (Providers & Personalisation), Alzheimer Scotland, IRISS, Joint Improvement Team, Dimensions Care, Helen Sanderson Associates, National Involvement Network, In Control Scotland, SPEAN, C-Change and Scottish Care.

Learning events organised through the forums have ranged from basic 'Introduction to SDS' training to more advanced 'Communities of Practice' that supported learning in areas such as outcomes frameworks, Finance and Human Resources and Individual Service Funds. Between 2011 and 2014, a total of 1,397 people attended these events. Their evaluation responses indicate that the events have helped to improve work practice in areas such as partnership working, the development and application of outcomes-focused approaches and engagement with the local implementation of self-directed support.

Outcome 2: Improved capacity to develop outcomes-based methods and approaches

Forum members have worked with ARC Scotland to deliver joint provider / local authority information sharing and learning events about outcomes, support

planning and evaluation tools. These have led to improved work practice and better understanding of the various approaches adopted by different organisations. Providers cite this as the most important factor in increasing their ability to improve the quality of life for the people they support.

'Certainly helped develop a much better understanding of person centred / outcome focused approaches and has helped support me to introduce this to teams / line manage'

Forum member

Outcome 3. Increased efficiency and reduced duplication of effort

There are several aspects to this outcome. Firstly, by being able to come together and share practice, providers can learn from each other's successes – and avoid repeating any mistakes.

'The shared learning gained from different experiences providers have faced has enabled me to have a more pro-active approach to self-directed support in particular'

Forum member

Secondly, providers save time by having external support to filter and make sense of the large amounts of information generated by national initiatives and policy and legislative developments in the sector. For national organisations this has a wider effect, as local managers are able to share their learning with their national offices. Finally, external partners, including local authorities, find it easier and more efficient to engage with providers in forum meetings rather than one-to-one.

Outcome 4: Improved relationships, understanding and links between local authorities and providers

Local authorities and providers both appreciate having a neutral space to engage with each other. The mutual benefits include increased insight into each other's perspective, and less anxiety about policy and commissioning. This will become even more important in future:

'We have a duty under the Public Bodies Reform Act to involve our third sector partners in the design of new integrated services and we have a duty to involve them in the commissioning process, which is different from the way it used to be ...I don't think there's a hope of us doing that unless we have forums.'

Planning & Policy Officer

'Going back 2 years, providers were really anxious about what was going to happen, and what the Council was going to do about commissioning. Getting the providers together has been really helpful.'

SDS Support Team

Forums are organised in such a way that a credible and collective voice can contribute to local planning and strategic commissioning groups, usually by having a nominated forum representative who attends these groups. This outcome is not to be underestimated, as local authority officials in other fields of work often report finding it hard to get productive engagement with independent or third sector organisations.

'With the consortium having a representative on the working group, that means that the local authority is also getting information as to what's happening elsewhere.'

SDS Working Group member

'The forum was established to involve our third sector partners in strategic commissioning processes. It recognises their role as principle stakeholders in not just strategic commissioning but in strategic development.'

Local authority Planning & Policy Officer

Supporting the Forums

When speaking to stakeholders about the value of ARC Scotland's work with forums the following four themes emerge:

1. Independent facilitation
2. Expertise and connectedness
3. Ability to provide a national overview
4. Providing a policy digest

1. Independent facilitation

'Because they (ARC) are neutral, someone who has no stake in this at all. So it's not led by local authorities, it's not led by another provider, there is a neutral lead here which gives them I think the feeling that they can trust, but also more, and rely on it.'

Contracts Manager

ARC Scotland is valued for its independence and its staff's skill at facilitating networks and information exchange. Several respondents mentioned the way they were able to join the forum without anyone feeling they were 'taking over'. ARC Scotland's role is recognised as having been genuinely neutral and facilitative. This has resulted in a shift in emphasis - and power - away from local authorities and towards topics of mutual interest to them and providers, something that has been welcomed by both parties.

'Their independence is appreciated and helpful - a neutral role that generates trust and confidence. A healthy challenge for us as providers.'

Forum Chairperson

2. Expertise and connectedness

People value external input to inform local discussions. ARC Scotland's expertise and connectedness are particularly important when it comes to policy and national developments like Self-directed Support and the Keys to Life. In other words, it is not enough for facilitation to be neutral; it also has to be informed. As one respondent put it, ARC Scotland's approach to facilitation is 'independent but expert'.

'They provide expertise; they have that kind of honest broker role in the sense that they can provide an overview without necessarily having a direct commercial or business interest in whatever opportunities are created.'

Joint Planning and Commissioning Manager



3. Ability to provide a national overview

People value ARC Scotland's ability to enrich their local forums by bringing in ideas and intelligence from other forums and from their knowledge of developments at a national and Scottish Government level. This helps members contextualise their local situations and learn from examples in other areas.

'(ARC) can talk about their experiences from other areas, to say "this group did this, this is what happened". It empowers people to hear successes in other areas.'

Forum Chairperson

4. Providing a policy digest

Stakeholders find ARC Scotland's ability to filter and prioritise information very helpful. They add value by filtering large amounts of information that people would otherwise be unable to keep up with. Respondents refer to this as providing a national 'foothold' or 'overview' and appreciate having an organisation that collates and disseminates good practice ideas.

'(The ARC worker) sends us information regularly, she's got one of the biggest files on my Outlook... I haven't come to depend on it but it's quite handy. It's a bit of reassurance that I'm not the only one that's working in that field.'

Planning & Policy Officer

Sharing Learning

Social Care providers from all sectors are, to a very large extent, willing to set aside commercial interests in order to work together at a local level for the best interests of the people they support. Given the extreme financial challenges that affect everyone in the sector, particularly the people we support, this is a precious capacity that should be encouraged and nourished.

We hope this brief report encourages you to think about what more you can do to work collaboratively with others in your local area. ARC Scotland are committed to supporting the continued growth of local networks and forums whenever possible. Please contact us if you would like to discuss this further.

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