

SCRUTINY REPORT



MEETING: Health Overview and Scrutiny

DATE: 5 March 2019

SUBJECT: Update on Persona Care and Support Ltd

REPORT FROM: Kat Sowden, Managing Director

CONTACT OFFICER: Kat Sowden, Managing Director

1.0 BACKGROUND *[brief]*

1.1 Persona Care and Support Limited was established 1 October 2015. The services which comprise Persona had previously been in-house services of the Council. In order to improve the sustainability of these services for the future the decision was taken to separate them off into a Local Authority Trading Company. This is a company which operates independently but is wholly owned by Bury Council.

1.2 Persona provides a range of adult social care services to people who are vulnerable due to age or disability. These include:

- *Day Services supporting 390 customers per week (Based on attendance December 2018)*
Pinfold Lane Centre (40 places per day for people living with dementia)
Grundy (70 places per day for older people)
10 Learning disability community bases plus some outreach facilities
- *Short Stay Services supporting 223 customers (Based on Jan-Dec 2018)*
Spurr House (36 beds for older people)
Elmhurst (27 beds for older people)
Woodbury (4 beds for people with a learning disability)
- Supported Living Services supporting 139 customers
71 supported properties (care needs from floating support to 24/7)
Extra Care Support (3 schemes)
Shared Lives

1.3 Persona's vision is to be the leading provider of adult social care in Bury, delivering excellent service all the time, every time. This involves providing support which improves quality of life and is tailored to the individual.

1.4 Over the past three years Persona has focussed on three main priorities (Appendix 1):

- 1.4.1** Maintaining High Quality Efficient Services
- 1.4.2** Building Effective Governance

1.4.3 Developing and Growing our Business

2.0 ISSUES *[brief]*

➤ Risk Management

Persona has a comprehensive risk register which identifies a range of operational and corporate risks and highlights mitigating action. This is regularly reviewed and included as standard in Board agendas.

➤ Equality and Diversity

Persona continues to observe high standards of practice in its approach to equality and diversity and this is enshrined within the values of the organisation under the Respect value.

Demographic data on the workforce is included in Board agendas as standard. The workforce is predominantly female (81%), and older with 52% aged 51 years and above. As an employer of more than 250 staff Persona is obliged to undertake Gender Pay Gap reporting. The current gender pay gap is 6.05%.

➤ Consultations

Persona has a number of mechanisms in place to ensure that the views of customers, staff and stakeholders are gathered and taken into account in the operation of the business.

Customers are asked to complete satisfaction surveys to feedback on their experience. Compliments and Complaints are collated and reported.

Staff have a number of opportunities to provide input through:

- Managerial arrangements – supervision, appraisal, team meetings
- HIVE – a digital survey system which also allows colleagues to give each other praise and recognition through Hive Fives
- Formal consultation arrangements – effective shop steward and Joint Consultative Committee arrangements in place
- Employee Forum is in place where representatives across teams meet to support information sharing, explore operational challenges, and obtain workforce feedback
- Annual Staff Conferences to share information and gain feedback on developments within the organisation

A forum for stakeholders including carers, family members and other professionals, Friends of Persona, is in place to gather feedback and ideas.

3.0 WHAT IS WORKING WELL?

3.1 Governance

Persona has developed a strong internal governance system as illustrated in Appendix 2. This comprises operational managerial meetings and committees, along with a weekly leadership team meeting. Board is comprised of the three Executive Directors, two Non Executive Directors, a Staff Director elected by the Employee Forum and a Non Executive Chair. Board meets every month, alternating between main board and workshops, where key strategic matters

are more widely explored, plus board development sessions. The Board reports in to the Shareholder by means of the Shareholder Panel. The Governance arrangements enable clear decision making and accountability.

3.2 Culture and Values

Persona has developed its own identity as an organisation and in 2018 launched a set of values and behaviours – R.E.A.C.H. Respectful, Enthusiastic, Adaptable, Caring and Honest (see Appendix 3). These were established by researching what already existed within the organisation as the common things which underpin the culture. A plan to further reinforce these values across the workforce is in place. This has seen the introduction of values based recruitment as well as the values being embedded in to the Hive Five system and My Impact Appraisal.

3.3 Finance

Persona has consistently maintained a healthy financial position since its creation, achieving the £1.2 million savings target set at the outset and generating a surplus each financial year (See Appendix 4). This has enabled the company to reinvest in to service provision whilst also developing a reserve. Investment back in to services in 2018 totalled £100,000. This included projects to improve assets for the benefit of customers such as the development of the bathrooms at Grundy, the development of the garden at Woodbury and the creation of an improved reception and lounge at Spurr House.

3.4 Customer Satisfaction

In the customer satisfaction survey conducted in 2018, over 95% of the 131 people surveyed reported that they felt the support provided to them helped them in their daily life. 87% reported that the service they received was 'really good'. Occupancy rates in the past 12 months are generally high across all services with LD Day Services averaging 96%, Grundy 94%, Pinfold 85%, Woodbury 75%, Elmhurst 87% and Spurr House 77%.

3.5 Workforce

The workforce has grown from 350 in October 2015 to 450 in December 2018. This growth is linked to increasing resilience in flexible staffing as well as business growth. The workforce is now comprised of 70% Local Authority terms and conditions, 29% Persona terms and conditions and 1% other terms ad conditions (due to the TUPE in of a small service from another employer). This will change again in 2019 due to the TUPE in of twenty NHS staff as part of the growth of the Supported Living Service. Financial assumptions of the impact of turnover of staff and replacement on Persona terms and conditions have been fully realised.

3.6 Achievements

There have been many things which have been achieved in the past three years:

- *Growth of the business*

New contracts for Extra Care and Supported Living have resulted in growth in the number of customers supported and the number of staff employed as well as financial growth.

Being part of the successful bid to host the Festival of Ageing in 2018 resulted in Persona co-ordinating the Bury and Bolton elements of the festival, raising organisational profile at a GM level.

- *New Services*
Development of a number of new services including Get Social (a drop-in activity based service), Escape (a service for young people with additional needs) and the Bathing Service. These are available to personal budget holders and self funders and diversify the services on offer to better meet a wider range of customer needs. (Appendix 5&6)
- *Implementation of new systems*
There has been investment in new ways of working including electronic care planning systems, improved nurse call in short stay, electronic medication administration and recording and film based training for staff. These improvements have been made in order to improve the efficiency and quality of services.
- *Culture and recognition*
The development of the culture has included the establishment of organisational hallmarks including the prestigious annual PersonAwards and introducing annual staff conferences which focus around Art of Brilliance principles of being the best version of yourself.
- *Partnership*
Working with others to provide improved outcomes for customers has been an area of success. From formal partnerships via Festival of Ageing, to more niche arrangements with local businesses, the approach of sharing expertise means customers enjoy a wider range of activities such as Shooting Stars physical exercise sessions and Bambino nursery visits.
- *Communication and branding*
The Persona brand has been firmly established and a strong social media presence developed. A monthly newsletter (Appendix 7) carries messages on successes and developments as well as reinforcing the values of the organisation. Some customer groups (Woodbury and Persona Friendship) have been supported to establish their own Facebook groups to improve their social connectivity and awareness of events that they can share in together.

3.7 Opportunities

Persona is currently engaged in work to explore opportunities for further growth and development in partnership with the Council. This presents the opportunity develop a more flexible and mutually supportive partnership approach. This includes exploring the opportunity to become more actively involved within the Local Care Organisation.

4.0 WHAT NEEDS TO WORK BETTER AND WHAT ACTION IS IN PLACE TO ADDRESS THIS?

4.1 Consistency

The organisation has experienced some challenges in some areas in respect of consistency in quality. This was identified in 2017 and is evidenced through the CQC ratings:

Regulated service	Oct-15	Jun-16	Jun-17	Aug-17	Oct-17	Oct-18	Jan-19	Feb-19
Spurr House	GOOD		REQUIRES IMPROVEMENT		GOOD	REQUIRES IMPROVEMENT		
Elmhurst	REQUIRES IMPROVEMENT	GOOD					GOOD	
Woodbury/Shared Lives	GOOD			REQUIRES IMPROVEMENT				?
Supported Living	GOOD			GOOD				

As the table shows there have been some challenges to maintaining a Good rating across all services. The main area of concern has been Spurr House as there have been three inspections during the period since Persona was established and two of these have resulted in Requires Improvement. A re-inspection is currently awaited following completion of the action plan from October 2018.

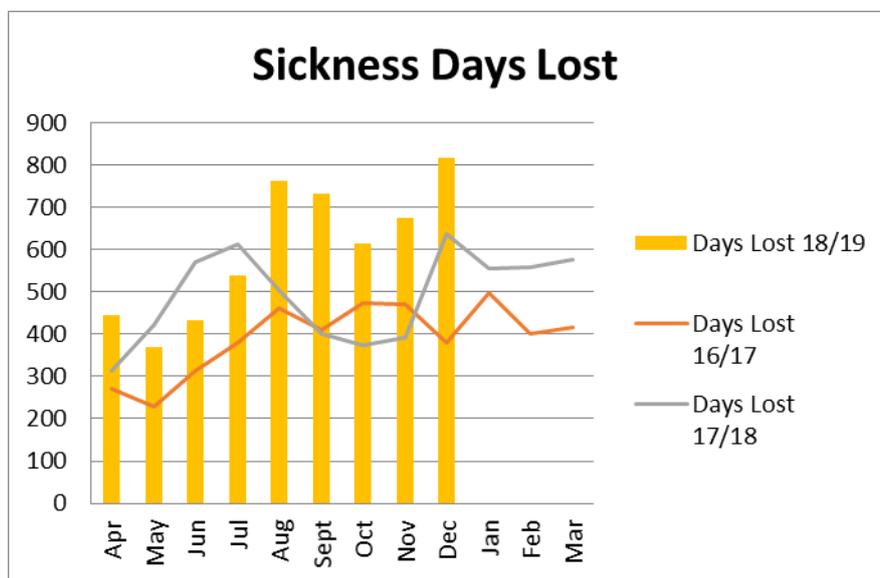
A number of actions have been taken to address these inconsistencies in quality:

- Changes in key personnel – in both Short Stay and Woodbury/Shared Lives
- Investment in consultancy support
- Development of a Quality Assurance Framework
- Investment in training and mentoring for Registered Managers
- Investment in mock inspection to identify development areas
- Additional temporary resource for short stay to implement a number of changes

The outcome from the recent Woodbury/Shared Lives inspection which took place in February 2019 is currently awaited.

4.2 Sickness

Persona operates the same sickness benefits policy as the Council for all employees. Those staff on local authority terms and conditions continue to have the same sickness pay benefits as when working for the Council. Those employees on Persona terms and conditions have a reduced sickness pay benefit scheme, but still one which is significantly more beneficial than the sector would generally provide. A number of other complementary schemes are also in place including access to counselling, physiotherapy and CBT. Persona also operate a 100% attendance scheme which rewards one randomly chosen person who has achieved 100% attendance every month with £100 of vouchers. Despite these initiatives sickness has not reduced and over the past 12 months has increased.



In order to better understand the reasons for this increase the employee forum have lead on gathering feedback from staff through a series of focus groups. This has then be followed up with a HIVE survey to all staff. The results of this have been used to inform a proposal for a revised approach which is being considered by Board for implementation in 2019/20.

4.3 Transport to Day Care

Transport to day care is an area which has not worked as well since Persona separated from the Council. Persona provide day care to a number of customers who require transport to get there. The Council provide the transport service. Issues in terms of where responsibility for customer management lies have been more apparent since the separation of the services took place. Essentially customers still see this as one service and look to Persona as the provider. When issues arise on transport the communication of this to customers and the management of them in this situation has been problematic. In order to resolve this, work is underway with the Council's transport team to explore how Persona could potentially take on more responsibility in this area to provide a better customer experience.

5.0 CONCLUSION *[brief]*

The creation of Persona in October 2015 was the start of a journey. Organisations are not created overnight and over the past years and months the organisation has begun to develop and evolve. Establishing strong governance arrangements and a value base has been a key foundation in this. The development of the organisation has not been without its challenges and this will continue to be the case. However, Persona has developed the expertise and agility to take it forward to develop as a sustainable organisation for the future.

List of Background Papers:-

Appendix 1: Business Priorities
 Appendix 2: Governance Structure

Appendix 3: Values
Appendix 4: Financial Position
Appendix 5: Escape Leaflet
Appendix 6: Get Social Leaflet
Appendix 7: Newsletter Feb 19

Contact Details:-

[Report Author]