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Agenda Item: 20.

## **Integration Joint Board**

Date of Meeting: 30 June 2021.

Subject: Ministerial Steering Group – Self-Evaluation – Update.

### **1. Summary**

1.1. The Ministerial Strategic Group (MSG) for health and care published a report on the progress of integration in February 2019. The ensuing self-evaluation and improvement plan have been reviewed and further workstreams are in place or planned to take forward the key areas that require further focus.

### **2. Purpose**

2.1. To provide Members with an update on progress with actions contained in the improvement plan arising from the IJB's self-evaluation of the recommendations arising from the MSG's report on progress with integration.

### **3. Recommendations**

The Integration Joint Board is invited to note:

3.1. The work completed to date on actions contained within the improvement plan, arising from the self-evaluation of recommendations from the Ministerial Steering Group for health and care's review on progress of integration, attached as Appendix 1 to this report.

3.2. The arrangements that are in place to progress the outstanding priority areas, as detailed in section 4.4 of this report.

### **4. Background**

4.1. The MSG for health and care published a national report on 'Progress with Integration of Health and Social Care' in February 2019. This report covered six 'feature' areas:

- Collaborative leadership and building relations.
- Integrated finances and financial planning.
- Effective strategic planning for improvement.
- Agreed governance and accountability arrangements.

- Ability and willingness to share information.
- Meaningful and sustained engagement.

Under each 'feature' the MSG put forward several proposals.

4.2. The MSG requested that each partnership undertake a self-evaluation in respect of each proposal. This was submitted by Orkney Health and Care to the Scottish Government on 15 May 2019. The MSG then requested that partnerships developed action plans for improvement. The Orkney improvement plan was submitted in July 2019.

4.3. At the meeting of the Integration Joint Board of 11 December 2019, it was recommended that the Chief Officer be instructed to take the MSG Self-Evaluation report to the Senior Management Teams of both Orkney Islands Council and NHS Orkney in order to obtain full support to develop the action plan by identifying cross-organisational groups as required to ensure the pace of integration could be accelerated. Due to sickness absence and the Coronavirus pandemic, these workstreams were not a priority at that time.

4.4. The Joint Discussion Forum is a meeting which provides an opportunity for the most senior representatives of each of the partners to come together to resolve issues informally and to help foster a culture of working together to improve outcomes. At the Joint Discussion Forum of 9 December 2020, it was proposed that due to the continued need to focus planning capacity on the pandemic, and the indication of a further period of lockdown after Christmas 2020, a detailed update on progress should be undertaken at a future date once operational demands had lessened. A proposal was also agreed that two short-term working groups should be established:

- Financial planning and information sharing.
- Governance, accountability, communication and leadership.

4.5. In April 2021, the Senior Management Team of Orkney Health and Care undertook a review of the partnership's progress in relation to the original self-evaluation and this draft document was the subject of discussion and noting at the IJB Voting Members' meeting of 4 May 2021.

4.6. Following this exercise, it was noted that information sharing was being addressed through a series of meetings involving Heads of Service and the Information Governance Officer of Orkney Islands Council/NHS Orkney. It was also noted that governance and accountability had been progressed, with the IJB receiving a positive internal audit report on governance at its Audit Committee meeting of 10 March 2021. It was also noted that the Chief Officer would liaise with the Chief Executives of NHS Orkney and Orkney Islands Council, the Orkney Health and Care Senior Management Team and staff group and the Area Partnership Forum and Senior Management Team/Union Liaison meeting to consider the process of restructuring Orkney Health and Care (taking account of the Scottish Government response to the Independent Review of Adult Social Care).

4.7. Alongside the information governance workstream and the restructuring process, there were two further key areas remaining which have been identified as requiring significant progress:

- Collaborative leadership and building relations together with meaningful and sustained engagement.
- Integrated finances and financial planning.

4.8. These two key areas will be taken forward through two separate working groups. Clearly, the first of these working groups will take account of the Scottish Government's response to the Independent Review of Adult Social Care which will significantly inform the shape of accelerated integration and new opportunities for collaborative working.

4.8.1. This first working group will be led by the Chief Officer and will include the Orkney Health and Care Senior Management Team, with invitations to the third sector, and to NHS Orkney and Orkney Islands Council.

4.8.2. The second working group will look at integrated finances and financial planning, again with membership including the Orkney Health and Care Senior Management Team, the Head of Finance (Orkney Islands Council) or nominee, and the Director of Finance (NHS Orkney), or nominee. The Director of Finance and the Interim Chief Officer had discussions in March 2021 regarding how to take some of this work forward and the Director of Finance has undertaken to set up meetings to help progress the identification of savings in relation to those services delegated by NHS Orkney.

## 5. Contribution to quality

Please indicate which of the Orkney Community Plan 2019 to 2022 vision elements are supported in this report adding Yes or No to the relevant area(s):

<b>Resilience:</b> To support and promote our strong communities.	Yes.
<b>Enterprise:</b> To tackle crosscutting issues such as digital connectivity, transport, housing and fuel poverty.	No.
<b>Equality:</b> To encourage services to provide equal opportunities for everyone.	Yes.
<b>Fairness:</b> To make sure socio-economic and social factors are balanced.	Yes.
<b>Innovation:</b> To overcome issues more effectively through partnership working.	Yes.
<b>Leadership:</b> To involve partners such as community councils, community groups, voluntary groups and individuals in the process.	Yes.
<b>Sustainability:</b> To make sure economic and environmental factors are balanced.	Yes.

## 6. Resource implications and identified source of funding

6.1. There are no direct financial resource implications arising from this report. Resource will be that of staff capacity.

## 7. Risk and Equality assessment

7.1. If an improvement plan is not fully developed and implemented, then the IJB will not be able to fulfil its full role and remit as set in legislation, including the duty of best value.

## 8. Direction Required

Please indicate if this report requires a direction to be passed to:

NHS Orkney.	No.
Orkney Islands Council.	No.
Both NHS Orkney and Orkney Islands Council.	No.

## 9. Escalation Required

Please indicate if this report requires escalated to:

NHS Orkney.	No.
Orkney Islands Council.	No.
Both NHS Orkney and Orkney Islands Council.	No.

## 10. Author

10.1. Stephen Brown (Chief Officer), Integration Joint Board.

## 11. Contact details

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## 12. Supporting documents

12.1. Appendix 1: MSG Improvement Plan with 2021 Update.

## MSG Improvement Plan and 2021 Update

Key.	Proposed Improvement Action.	Specific Task.	By When.	Lead Officer(s).	Update June 2021
<b>Collaborative Leadership and Building Relationships.</b>	<p>Our approach to collective leadership will continue to grow. Building our culture on having different conversations with people and communities.</p> <p>Our approach will be designed to enable our staff to recognise the permission they have to 'do the right thing'.</p> <p>We will indeed look for any further opportunities or learning from the National audit to be undertaken by Scottish Government and COSLA.</p> <p>To continue to develop and protect our culture so that challenges and pressures can be discussed openly, timeously and with early resolution as our aim.</p>	<p>Continue to develop Community Led Support.</p> <p>Continue to identify opportunities to engage in dialogue with individuals and communities.</p> <p>Work with staff to reduce bureaucracy as far as possible.</p> <p>To review further learning from the National audit and look to apply that learning in</p>	2019 – 2021.	Chief Officer / Chief Executive Officers.	<p>The Scottish Government's response to the Independent Review of Adult Social Care will significantly inform the shape of accelerated integration, and define new relationships and collaborative working opportunities.</p> <p>Considerable joint working with partners and third sector organisations has been undertaken during the pandemic in terms of resilience meetings through the Care for People Group, and meetings and liaison to ensure access to PPE and effective staff testing across all services, in-house and commissioned.</p> <p>Priority in the 2019 – 2022 Strategic Plan and the Strategic Commissioning Implementation Plan (SCIP) for 21/22.</p>

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	<p>To continue to ‘think third sector’ in all that we do, when we are commencing work or reviewing work.</p> <p>Continue to strive to ensure our third sector colleagues are equal partners.</p>	Orkney, where appropriate			<p>As above. The IJB’s Communication and Engagement Strategy was approved by IJB in April 21.</p> <p>Microsoft Teams improves efficiency.</p> <p>Work undertaken from September 2020 to streamline IJB Governance to enable most efficient use of time.</p>
<p><b>Integrated Finance and Financial Planning.</b></p>	<p>The IJB S95 Officer will work with NHS and OIC to improve clarity around specific funding sources, ho they are spent and what outcomes are achieved. This will include having view access to NHS finance systems and attending various meetings where the funding is discussed i.e. PCIF allocations.</p> <p>It is hoped that the NHS and Local Government will be moving towards a three-year budget cycle which will enable better</p>	<p>Revisit baseline budgets for all services delegated to the IJB.</p> <p>Adopt an inclusive process for dealing with budget setting and identification of efficiencies.</p> <p>Design a three-year cycle to allow more effective</p>	Present to April 2020.	<p>Chief Finance Officer; Head of Finance, Orkney Islands Council; Director of Finance, NHS Orkney.</p>	<p>Some work has been undertaken to identify small efficiencies within the IJB budget. The planning of further efficiency savings is a key priority and is scheduled to be taken forward by officers through regular finance Senior Management Teams. The set aside budget also requires further focus, with some initial work undertaken with the Chief Officer and the Chief Finance Officer.</p> <p>Finance workshops took place in August 2020 and January 2021 with actions requiring progress.</p>

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	<p>planning to achieve the aim of the Strategic Plan.</p> <p>There will need to be planning discussions held to ensure that the IJB is able to have all the required budget information available to facilitate the funding allocations being presented to the Board in March of each year.</p> <p>To work with Scottish Government colleagues to ensure information from them to statutory partners is timely.</p> <p>Further work needs to be undertaken to understand the budget and what responsibilities the IJB should have in not only understanding the budgets but the commissioning responsibilities that go with this.</p> <p>The reserves policy will be reviewed in 2019/20.</p>	<p>transformation to occur.</p> <p>Agree an aligned budget setting process.</p> <p>Review the 'set aside' budget in order to clarify the Orkney position.</p>			

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	<p>The IJB S95 Officer will work with NHS and OIC to improve clarity around specific funding sources and how they are spent and what outcomes are achieved. This will include having better access to NHS finance systems and attending the various meetings where the funding is discussed i.e. Primary care Improvement Fund allocation.</p> <p>There is a proposal to review all the baseline budgets to ensure that funding will be delegated to the services and more detailed directions will be required so partners know what is being commissioned by the IJB. There was also updated Directions guidance to be received from Scottish Government which would aid this process.</p>				

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	Further discussions about how the IJB can be supported to allocate resources including finances as it feels appropriate need to be held. There is recognition and the political will to allow the IJB to move into this space, where it is empowered to use allocated money as it needs to be. It was noted that decisions are sometimes made prior to the IJB receiving it.				
<b>Effective Strategic Planning for Improvement.</b>	Review the structure of Orkney Health and Care with cognisance of its full remit and responsibilities, as well as reviewing attendance at meetings, whilst ensuring that specific responsibilities in relation to accountabilities and responsibilities as required by Scottish Government are fulfilled. Early discussions that have been had with	Review of Orkney Health and Care structure – considering the cross-cutting themes with both other statutory organisations. Identify interim structure to help lessen impact of	Autumn 2020. April 2020.  Ongoing.  March 2020.	Chief Officer.	Given the set of urgent priorities requiring to be addressed by the Interim Chief Officer in August 2020, it was agreed by the Interim Chief Officer and two Chief Executives that restructuring would be taken forward by the permanent Chief Officer once appointed, in close liaison with the two Chief Executives, the NHS Orkney Area Partnership Forum and the Senior Management Team/Union Liaison Meeting of

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	<p>academic organisations to support the collection and analysis of local data need to be progressed. Need to have a clear approach to evaluating the impact and effectiveness of our strategic priorities.</p> <p>Develop the ‘think third sector first’ when looking at filling or developing future posts.</p> <p>To continue to develop a thinking of ‘care and support in the right place’, rather than continuing to think ‘shifting the balance of care’ – this continues to demonstrate our ability to build and maintain relationships and our commitment to collaborative leadership.</p>	<p>significant vacancies.</p> <p>Continue to develop close working relationship with ISD.</p> <p>Review of the Scheme of Integration</p>			<p>Orkney Islands Council. This will take account of the Scottish Government response to the Independent Review of Adult Social Care. The focus to date has therefore been on recruiting to the range of vacancies and stabilising the services to the extent possible. During the COVID-19 pandemic we have adapted the historical structure to meet current need on an incremental basis, when vacancies occur pending the restructure.</p> <p>Close working with Public Health Scotland has been achieved and is now enhanced following the recruitment of the Planning and Performance Officer.</p> <p>A rudimentary review of the Integration Scheme took place in 2020 and since then, a more fundamental review of the Integration Scheme is now in final stages of review and approval.</p>

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<p><b>Governance and Accountability Arrangements.</b></p>	<p>Local agreement to revisit the Integration Scheme to ensure all delegated functions are sitting solely with the IJB.</p> <p>Review the ongoing need of the Orkney Health and Care Committee as the IJB matures into its full remit.</p> <p>To improve the induction process for new IJB members.</p> <p>To seek to streamline planning, audit and budget setting processes across the statutory partner agencies and to aim to achieve greater integration of committees and working groups to reduce duplication.</p> <p>We will review our use of Directions when the statutory guidance is published.</p> <p>Again, when the statutory guidance has been</p>	<p>Review Scheme of Integration.</p> <p>Review current committees.</p> <p>Review the committees and other meetings the Chief Officer must attend.</p> <p>Hold seminar of Directions.</p> <p>Hold seminars on the roles and responsibilities of the IJB and its officers.</p>	<p>March 2020.</p> <p>December 2019.</p> <p>December 2019.</p> <p>December 2019.</p> <p>December 2019.</p>		<p>The Integration Scheme has now been reviewed and awaiting feedback from Scottish Government (see last bullet point above).</p> <p>The Orkney Health and Care Committee remains in place at present.</p> <p>Role descriptors have been prepared for all IJB Members.</p> <p>Joint Clinical and Care Governance Committee Terms of Reference have been developed and are being presented for approval in June 2021 by the Health Board and the IJB.</p> <p>A report on Directions was presented to the IJB in September 2020 based on the statutory guidance.</p>

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	released, we will review our local arrangements.				
<b>Ability and Willingness to Share Information.</b>	Capacity to undertake robust reporting needs to be identified. We will identify ways of ensuring learning and good practice are easily identifiable in our future reports. Discussion within the National Chief Officers group.		Memorandum of Understanding.	Chief Social Work Officer and Head of Children's Health Services.	Performance and planning Officer in post. Memorandum of Understanding on information sharing in place. Chief Social Work Officer and Head of Children's Health Services leading further work on more detailed data processing and data sharing agreements.
<b>Meaningful and Sustained Engagement.</b>	Specific interest and remit groups will be increasingly approached for input and comment on service change, redesign, and development. Continue to identify natural opportunities to engage with our communities. The implementation of Community Led Support will ensure that communities are enabled to directly shape the	To fully embed Community Led Support as an approach to assist in successfully delivering the Strategic Plan.	2019 – 2021.	See first entry of Collaborative Leadership.	During the pandemic, specific liaison with our communities has taken place through the Community Liaison Group and the Caring for People Group. Priority in the 2019 – 2022 Strategic Plan and the Strategic Commissioning Implementation Plan (SCIP) for 21/22.

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	<p>design of community health and social care services.</p> <p>The implementation of Community Led Support will ensure that communities are enabled to directly shape the design of community health and social care services.</p>				