

# Digitising and Streamlining Assessments – Trusted Assessments Webinar

Wednesday 06 December 2023 – 10:00 – 11:00  
Partners in Care and Health

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# Digitising and streamlining assessments webinar series – Trusted Assessments

## Hosted by:

- Lyn Romeo, Chief Social Worker for Adults

## Guest speakers:

- John Woods, Head of Improvement, Social Care, NHSE
- Chris Erskine, PSW, Lincolnshire County Council
- Sarah Scaife, Contract Manager, Lincolnshire County Council
- Melanie Weatherley, MBE, Lincolnshire Care Association
- Heather Lindley, Head of Business Development and Operations, Atlas Care

# Agenda

1. Introduction - Lyn Romeo
2. Principle of Trusted Assessments – John Woods
3. Lincolnshire example – Chris Erskine, Melanie Weatherley, Heather Lindley, Sarah Scaife
4. Open discussion



# **Introduction**

**Lyn Romeo, Chief Social Worker for Adults**

# Proportionate assessment approaches

Trusted Assessments are one of several different types of methods that may be used to conduct care and needs assessments highlighted in the proportionate assessment guide that was published in August, and discussed at the first of this webinar series in October.



Guidance  
**Proportional assessment approaches: a guide from the Chief Social Worker for Adults and principal social workers**  
Updated 7 September 2023

Link to [guide](#)

## Proportional assessment guide

The Chief Social Worker published the proportional assessment approaches guide in August 2023. This guide was updated in November 2023 to include the perspective of occupational therapists.



Link to [webinar](#)

## Webinar on proportionate assessment

- The Chief Social Worker and the Principal Social Worker network co-chairs hosted a webinar on the guide and on proportionate assessment approaches on 12<sup>th</sup> October 2023.
- Large participation – 360 participants joined the webinar.
- Webinar and slides now available from SCIE's website.



# **Principles of Trusted Assessments**

**John Woods, Head of Improvement, Social Care, NHSE**

# TAs or TAs & Why



## Trusted Assessment

You use another assessment to complete your own



## Trusted Assessor

Some one does the assessment for you



## Why

To speed up the process &/or  
To deal with a resource issue



# Principles To Consider

- **1. Co-design and co-delivery**
  - How can all organisations involved in the trusted assessment process co-design and agree a streamlined and simple assessment process?
  - How important is it for third parties (including independent care providers) to be fully involved in the development and delivery of the service?
  - How can the patient voice/patient experience and feedback be included?
- **2. MOU**
  - Is a Memorandum of Understanding essential for all Trusted Assessments? If not, what will you use?- Who should lead on ensuring there is a memorandum of understanding between all organisations involved in the Trusted Assessment process? Which organisations should be involved?
- **3. Objectives**
  - What are the aims and objectives of using trusted assessments? How can these be established? What are you trying to achieve?

# Principles To Consider

- **4. Trusted Assessor role**
  - Who is a Trusted Assessor? Is it a dedicated post or part of a professional role with wider responsibilities? Can it be both? - What are the main obstacles in recruiting a Trusted Assessor? What are the main functions of the role? What training is available to support Trusted Assessors?
- **5. Data analysis**
  - Have you considered the data that needs to be collected when considering a trusted assessment approach (at the start of the process)?
  - What data needs to be collected to ensure that trusted assessments are the right approach (in monitoring how many trusted assessments are done and whether they lead to satisfactory outcomes)?

# Principles To Consider

- **6. Decision making**
  - How can decisions about or resulting from Trusted Assessments be challenged or escalated? Who are they escalated to? - How are problems in the Trusted Assessment process, or between parties involved in the process resolved?
- **7. Adherence to Care Act**
  - How can you ensure adherence to the Care Act within the Trusted Assessment process?
- **8. Recording conversations**
  - Can recording Trusted Assessments support LA assessors to determine final eligibility? What is the best way to record conversations/information? Have you considered how this will have an impact? Will it support verification/ result in more satisfactory transfer to adult social care?

# Principles To Consider

- **9. Financial assessments**
  - What information does a Trusted Assessor need to relay to the person in need of care and support about the financial assessment process?
- **10. Verification**
  - How can Trusted Assessments be verified? Who needs to be involved in the verification process? How can a verification process involving the relevant organisations be established? Could verification prompt the need for further review? What impact will this have?

# **Lincolnshire Example**

**Chris Erksine, Principal Social Worker**

**Melanie Weatherley, MBE**

**Heather Lindley, Head of Business Development and Operations**

**Sarah Scaife, Contract Manager**

# What is a trusted reviewer?



A person carrying out a review on behalf of the Local Authority where this is the right thing for the person-No legal barrier



A person working for & employed by a care provider, their role is to carry out a review on behalf of the Local Authority to allow for prompt changes in support by the **right person, at the right place and at the right time.**



A Trusted Assessor completes a review for someone in the community receiving care and support.

# When might we use a trusted review?

Where someone with care and support needs a planned annual review

Where the person has identified a need for change in support

Where there has been an identified need for additional or reduced support

Where it has been identified support can be provided in a different way

# Trusted Reviewer Pilot....



Why? to free up much needed capacity-break cycle of failing to get support due to availability.



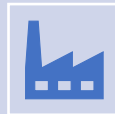
Recognises that carers know the person well and bring knowledge and skills



Workshops for providers led by the Principal Social Worker, Practitioners and the Commercial Team



Over 60 reviews completed to date across 3 providers;



Co-production-working hand in hand with providers and practitioners to help us develop



Working to embed TEC first and Strengths based approaches trusted review



People are saying they would be happy for the provider to lead the review in the future.



Overwhelmingly people felt included in conversations and that they discussed what was working well

**Seen as a regional lead, our possible next steps include a wider trial across all zones; varying the types of review such as following discharge or 6 week review**



# Progress



**Initially part of increasing capacity in Home Care**



**Career development opportunity for home care staff- increasing retention**



**Delegating review and assessment activity to suitably competent provider staff**



**Lincolnshire has widened pilot to include all commissioned providers**



**Delegation to providers is included in Lyn Romeo's & PSW's guide to Proportional Assessment Approaches**

# Findings– Additional benefits that we did not always expect

1

Feedback from people receiving support:

- Appreciated only having to tell their story once
- Felt very comfortable speaking to people that knew them

2

Reviews can be done at a time to suit people and their families

3

Better understanding and mutual respect between ASC practitioners and home care provider staff

- More coordinated care and support

4

Recognition of the skills of home care staff

**“I have found this experience to be empowering”.....“this has the potential to change adult care for the better”  
“I have seen the positive changes it could have on the lives of people”.....**

# Next Steps....



**Practical support to expand the pilot to other parts of the region**



**Readiness tool for local authorities to identify what is needed**



**Develop a toolkit to support implementation**



**Develop a common Quality Assurance framework for the region**



**Potential Funding for the expansion**



**Support to submit a bid for DHSC Innovation grant to expand and evaluate the pilot phase**



**Research the impact of trusted assessment both in home care and the residential market**

**Open discussion**



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Thank you for your participation. This webinar was brought to you by DHSC, SCIE and Partners in Care and Health working in partnership.