

Guidance based on the national Good Practice guide for the provision of Community Equipment Services

Finance

The national Guidance has identified the need for local authorities (including Social work, Housing, and Education), and NHS bodies, to identify all spending on equipment across their services and consider the pooling of budgets/integration of funding arrangements, and the creation of jointly funded Store services.

Funding arrangements and Budgets for equipment provision

Funding arrangements should be agreed jointly across the services and budgets set up in way that supports direct access to equipment in line with the service pathways. The funding should provide for all parts of the service delivery including all Store service costs (lease, running, maintenance, staffing, transportation, procurement, Health & safety...) as well as Training & communication costs, and any additional project resources including personnel

- running costs for Stores services require to be jointly shared across relevant Partners
- Costs should be shared, based on activity.
- equipment costs should be charged at point of use
- Where ever possible, services should be paying for equipment based on who assesses and orders (and not on historical professional arrangements)
- Funding arrangements should include adequate resources for Training/Communication
- There should be agreed funding arrangements for any joint posts required to support the service

Monitoring

Monitoring mechanisms and structures should be set in place, which ensure full ownership and accountability in relation to equipment expenditure, across all services. These arrangements should provide a framework for the annual (and ongoing) review of budget requirements:

- There should be a dedicated Finance Group for the equipment service with named officers who have overall responsibility for financial arrangements across the Partners.
- There should be robust arrangements, with senior strategic management, for the ongoing review of budget requirements and clear timescales around forward planning for annual budget review

Reporting

Financial reporting should be frequent and detailed. The frequency should be agreed locally and fit with other reporting cycles e.g. 4 weekly.

- financial reports should be submitted to the overarching group of strategic managers for monitoring
- A wide range of local operational line managers should be provided with the financial reports to ensure their accountability and ownership.
- trend reports should be provided and actively analysed to support future funding and alert to pressures

Accountability against Care group/service areas

Spending against equipment should be easily identified against locality service (geographical) care groups (e.g. Older People, Children, Learning Disability, Mental health....) and managers within these services require to be fully accountable for the equipment selected by their staff irrespective of whether they hold the budget.

- The financial reports should breakdown spend against each care group within locality services
- managers within these services should be actively managing expenditure (including authorising orders)

DESCRIPTION of FINANCIAL ARRANGEMENTS in PRACTICE

The equipment that staff choose to order for their service users, should be charged directly to that service's budget irrespective of what type of equipment has been selected. There may be some locally agreed exceptions to this which are commonly found within most services, examples of which are referred to below: e.g.

- Arrangements may be set in place to allow hospital based OT staff to directly order against relevant community budgets if no existing budgets exist for this spend within the Hospital budget arrangements.
- In some areas other specialist based staff e.g. Learning Disability/Children's services OT staff.... their expenditure may drop against the relevant local authority budget;

All services are expected to take full responsibility for the monitoring and supervision of their equipment service expenditure, irrespective of which budget the charges will drop from, and work to agreed budget arrangements and constraints for each relevant service area.

Equipment, which requires authorisation from designated line managers, should be agreed in advance (insert Appendix). Managers who authorise are taking full accountability for the equipment ordered by their staff, from a competency and financial basis, irrespective of which services budget will pay for the equipment.

Four weekly monitoring reports should be available to provide managers with detailed information on the expenditure by their staff. There should be accompanying Activity sheets which name staff who have ordered and describe the types of equipment selected. This information allows managers to monitor the appropriateness of their service usage, and expenditure by others against their budgets.

Any concerns or queries regarding budgetary expenditure should be directed to a designated Partnership manager/lead.